# **I2SL Chapter Best Practices Guide**

The International Institute for Sustainable Laboratories (I2SL) is a 501(c)(3) nonprofit professional organization that provides information, education, and tools to help improve the energy and environmental sustainability of laboratories and related high-technology facilities worldwide. Incorporated in Washington, DC, in 2005, I2SL is headquartered at 2300 Wilson Blvd., Suite 350, Arlington, VA, 22201 USA. I2SL Headquarters (I2SL HQ) maintains a growing network of thousands of individuals representing hundreds of companies and institutions from around the world and a membership of more than 650 individual and organizational lab owners, operators, designers, engineers, builders, product vendors, and service providers.

I2SL's community is working to make the world's laboratories and related high-technology facilities more sustainable. To help expand the reach of this mission, I2SL establishes chapters around the world. I2SL chapters are able to leverage their contacts, hold events, network with other professionals in their local markets, and offer other resources within the chapter's geographic region. As I2SL's membership and chapters grow, they help strengthen and sustain I2SL and its mission.

#### **Chapter Finances and Administration**

#### **Chapter Structure**

All I2SL chapters operate under the 501(c)(3) tax "umbrella" of the headquarters organization (except international chapters), which allows them to avoid substantial costs associated with incorporation, annual reporting to the Internal Revenue Service, and necessary insurance fees. U.S. chapters receive banking and accounting services and insurance coverage from I2SL HQ for an annual maintenance fee billed in the second and subsequent years after a chapter forms. Chapters are accountable to I2SL HQ for all financial transactions they undertake once the chapter charter is approved.

#### **Chapter Payments**

U.S. chapters 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.
- 10 percent 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, including but not limited to unique chapter logos, updates to the chapter's page on I2SL's site, maintenance of mailing lists, processing American Institute of Architects (AIA) credits, and program materials for local distribution. Therefore, each chapter is required to pay I2SL HQ 10 percent of the organization's non-membership gross revenues as calculated at the end of I2SL's fiscal year on December 31, given the following:

- Chapters that collect a local membership fee will not be assessed 10 percent of the revenues earned from such fees.
- o Non-membership chapter revenues are defined to include event registration fees (individual and corporate), training revenues, and chapter sponsorships.
- 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.
- \$1,200 Annual Accounting Fee: This fee is to be paid by 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. This fee is not applicable to international chapters.
  - o This fee will be invoiced by I2SL HQ at the beginning of the calendar year 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.
  - 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.
- Chapter Finances: I2SL HQ administers a checking account, investment account, credit card account, online bookkeeping account, and tax accountant on behalf of chapters.
  - o Chapters may request a chapter credit card from HQ; to help verify charges, the cardholder should send invoices and/or receipts for key charges to <a href="mailto:kathleen.brady@erg.com">kathleen.brady@erg.com</a>. To request a card, contact Kathleen Bady at 201-236-6194.
  - o Chapter officers or other representatives who incur costs on behalf of the chapter can request to be reimbursed by HQ from that chapter's allotted funds using the <u>reimbursement form template</u> and by submitting all receipts. Where checks are needed for event venues, caterers, or other service providers over \$600, chapters must obtain a W-9 form from that vendor for tax filing purposes.

# **Chapter Events**

The I2SL Annual Conference is a great way for industry professionals to hear and share the latest, cutting-edge industry knowledge and to network with top tier talent from across the globe. However, not everyone can attend as many have constraints on cost and time. I2SL chapters offer various local events to encourage participation and networking on a local level, such as education days, happy hours, tours, golf outings, etc. Local chapter educational events can be especially valuable for training younger professionals or to provide needed continuing education credits for established veterans.

As an educational organization, I2SL encourages chapters to host educational events geared towards improving the sustainability and decarbonization of laboratories. Many chapters have chosen to host an Education Day after the I2SL Annual Conference to provide those that couldn't attend an opportunity to hear relevant presentations. Local speakers from the conference are asked to present their abstract to the chapters followed by a question-and-

answer session or discussion. Chapters also host tours of laboratories with sustainable design and presentations or webinars on specific topics of local interest to lab owners, designers, and engineers.

In addition to educational events, I2SL encourages chapters to host networking events for local members. In the past, chapters have held golf tournaments, happy hours, movie screenings, and brewery tours with much success.

#### **Setting Up an Event**

I2SL has created an online <u>Eventbrite</u> account that chapters should use to set up registration and collect funds for both in-person and virtual events. To funnel all chapter event payments to the I2SL bank account, I2SL HQ requires chapters to use I2SL's Eventbrite account instead of individual or chapter accounts with Square or Eventbrite; however, this process does require each chapter to have an Eventbrite account to associate with HQ's.

Eventbrite allows chapters to promote their event, track registration, collect payments, and pull attendee lists. I2SL has the Boost level of Eventbrite, which chapters can use to send out emails about the event. For instructions on how to set up your chapter's Eventbrite account or how to create an event, please follow the steps in Appendix A.

I2SL HQ will provide a list of members and network participants in a chapter's area at any time upon request for promoting events. Simply email <u>info@i2sl.org</u> your parameters or relevant zip codes.

Chapters don't have to charge a lot for events, but a registration fee will encourage registrants to attend and allow the chapter to receive a return on their investments. Some chapters charge I2SL member vs. non-member rates, which can help grow I2SL membership.

**Lesson Learned:** Once the Northern California Chapter began charging for registration, they saw a significant decrease in no-shows (below 10 percent).

Depending on the type of event, the location may be a large cost for the chapter. Many members' company offices allow organizations to host events in their space or if their facility would be interested in offering a tour. Chapters often find that this can help significantly reduce or remove the cost of the event's venue. Some events require a chapter certificate of insurance (COI); I2SL's current COI is posted on our <u>Chapter Resources web page</u>, or email <u>info@i2sl.org</u>.

#### **Hybrid Events**

Chapters may want to consider providing a virtual attendance option in addition to in-person presentations to increase their reach. Chapters that cover a large area can also hold an in-person event and broadcast it to another location so that members who come in person have the opportunity to network. Chapters can also record a presentation and hold a live Q&A session. If the venue permits, I2SL suggests planning and testing the technology of the event ahead of time for presentation purposes or hybrid events. Chapters can also request a mic specially designed to increase sound from a laptop for hybrid events; contact <a href="mailto:kathleen.brady@erg.com">kathleen.brady@erg.com</a>.

#### **Continuing Education Credits (AIA)**

I2SL is an American Institute of Architects (AIA) Continuing Education System provider. I2SL offers its chapters the opportunity to provide AIA Learning Units for educational sessions the chapters host that are one hour or more in length. I2SL will submit the educational session information for AIA Learning Units and will report credits earned by session attendees who are AIA members on behalf of the chapters. Chapters are responsible for providing certificates as proof of attendance if session attendees would like to self-report credits for their Green Building Certification Institute or Professional Engineer memberships; email <a href="mailto:info@i2sl.org">info@i2sl.org</a> for a template.

For instructions on how to receive AIA credit for chapter events, please follow the steps in Appendix B.

#### **Chapter Event Best Practices**

- **Set up your event on Eventbrite.** Eventbrite take a percentage of each ticket, but you can set up the fees to be passed on to the attendee and collect the full cost.
- **Charge attendees.** A registration fee may encourage registrants to attend.
- **Use member offices for events.** Consider utilizing corporate offices of members for events to minimize costs.
- **Plan Education Days.** Hosting an Education Day with speakers from the Annual Conference provides those that couldn't make it to the conference a chance to hear presentations on local projects.
- **Hold networking events.** Chapters should encourage networking to increase chapter involvement.
- **Test your technology.** If the venue permits, plan and test out the technology of your presentations and/or hybrid event ahead of time.
- Offer AIA credits when appropriate. Provide an abstract to <a href="info@i2sl.org">info@i2sl.org</a> with four learning objectives.

# **Fundraising**

Fundraising is essential to ensure resources for chapter operations, so assigning a lead officer or a sponsorship chair to focus on fundraising is encouraged. Chapters can create a <a href="mailto:sponsorship tracking spreadsheet">sponsorship tracking spreadsheet</a> to track fundraising efforts; please give <a href="mailto:info@i2sl.org">info@i2sl.org</a> access, so HQ note when sponsor payments are received which chapter they are meant for.

Most chapters provide three types of sponsorship opportunities: Founding, Annual, and Event sponsorships. Founding sponsorships are offered at the start of the chapter's creation then transition to an annual sponsorship option, which companies can renew each year. Chapters can offer different sponsorship levels (bronze, silver, gold, and platinum) to allow for a greater variety of donors; chapters' sponsorship amounts vary by region and can range from \$300 to \$3,000.

When a company has indicated interest in sponsoring a chapter, the chapter should send the company an <u>invoice</u>. The sponsor should then fill out the <u>Chapter Sponsorship Payment Form</u> and email it to <u>info@i2sl.org</u>. Once I2SL HQ processes the payment, I2SL HQ can send a <u>receipt</u> to the company.

Because I2SL is a 501(c)(3) nonprofit organization, sponsorship contributions are eligible for a tax deduction. Sponsors may need I2SL's <u>W-9 form</u> or other proof of nonprofit status for their files; email <u>kathleen.brady@erg.com</u> for a copy.

Once you have received a sponsor, request their logo to include on your website (email it to <a href="info@i2sl.org">info@i2sl.org</a> if your website is managed by HQ). Chapters should recognize sponsors at events and include their logos in promotional emails, signage, and social media posts.

#### San Diego Chapter Sponsorship Example

The San Diego chapter offers annual sponsorships in the first quarter, and sponsor benefits run throughout the end of the year. In early 2023, the chapter increased their sponsorship opportunities by 10 percent to account for inflation. The chapter includes all sponsors in event emails and posts about them on social media platforms (ex. LinkedIn, Facebook etc.)

The chapter holds an annual golf tournament as their main fundraising effort throughout the year. The golf course that the chapter uses is an executive course which is shorter (~3.5 hours) and is more affordable. After the tournament, the chapter raffles off prizes and provides drink tickets for attendees. This event is always scheduled on a Friday, and attendees are encouraged to join a happy hour after the tournament. The San Diego Chapter made a profit of \$5,600 the first year they held the tournament.

#### **Texas Chapter Sponsorship Example**

The Texas chapter launched their sponsorship program with founding sponsors and event sponsors and transitioned to annual sponsors in 2023. Founding sponsors of the chapter can renew their sponsorship at the same low rate each year and will always be recognized as a founding sponsor. The chapter used their founding sponsorships to pay for their chapter start-up fee. In January, the chapter sends invoices for annual sponsorships, so they do not have to track payments throughout the entire year. The chapter also has event sponsorship opportunities but always recognizes their founding and annual sponsors at events.

# **Chapter Fundraising Best Practices**

- Assign a fundraising chair or officer to lead a committee on sponsorships and set annual fundraising goals.
- Make a sponsor tracking spreadsheet, assign board or fundraising committee members a target, and encourage them to update the sheet as they contact leads.
- **Identify sponsorship levels and amounts**. It's ok to occasionally increase sponsorship level amounts to account for inflation.
- Recognize sponsors by thanking them at events and include their logos in emails and social media posts.

#### **Newsletters/Chapter Communications**

Newsletters are a great way to inform your local network about chapter events, news, and updates from I2SL HQ, as well as highlight chapter sponsors. Not many chapters have newsletters, but some have had success with consistent emailed communications.

For those interested in creating a chapter newsletter, gather a working group of two or three volunteers, set regular check-in meetings, and have a publishing deadline. Think realistically about how often you can send out a newsletter; consider starting out quarterly or every other month. This will allow the group to create a sustainable workflow and compile content.

Once you set the foundation, plan how your chapter will distribute your newsletter. The St. Louis Chapter uses Mailchimp to generate and send out their newsletter because it generates an open/click rate report. They also use WordPress to create a website where they publish their newsletter. Chapters can utilize the free version from Google that is very user-friendly. Other options include creating a Word or Google doc, converting it to a PDF, and embedding it into an email. Templates are available through Mailchimp, Word, or Adobe.

Including events from I2SL HQ, other I2SL chapters, or events from other organizations that the chapter partners with is an easy way to cross-promote events. Local news stories about lab developments or new construction projects from chapter officers or sponsors can also provide interesting content. Be sure to include direct links to source material or registration pages as it makes it easier for the reader to engage with your content.

For more newsletter content, chapters can create news and Google alerts for keywords for articles, subscribe to other mailing lists to promote local events, register for the <u>Circular Economy for Labs Community of Practice</u>, participate in the Labs2Zero technical advisory council forums, check out the What's New section on <u>www.i2sl.org</u>, or ask chapter participants to send in news alerts.

# Succession and Avoiding Board Burnout

Board members and officers play a crucial role in the success of the chapter; therefore, avoiding Board burnout and having a clear plan of succession is essential. I2SL recommends that chapters create (and occasionally update) bylaws to ensure consistency in how the organization operates. I2SL has <u>sample bylaws</u> that chapters can use as a starting point for their own, or check out the bylaws linked below from these chapters:

- Arizona Chapter Bylaws
- Colorado Chapter Bylaws
- Heart of America Chapter Bylaws
- New England Chapter Bylaws

Within the bylaws, chapters should include the length of Board members' terms and rules of reelection, so when an officer's term is nearing the end, there is a succession plan in place. Most chapters have at least two-year or three-year term length for Board members. When a Board member's term is over, consider the following examples to recruit new members:

- The Colorado Chapter sends out a <u>Board member application</u> to anyone who participates in their chapter and encourages those who are interested to apply to be on the Board. The Board reviews the applicants and chooses new members.
- The New England Chapter has open nominations for Board members but requires they be I2SL members. **NOTE:** All I2SL chapters' elected officers MUST be I2SL members in good standing; I2SL HQ will email any expired officer members annually at the end of the calendar year to renew, then email chapter presidents of any who still have not renewed.
- Board members of the Arizona Chapter reach out to people who were involved in the chapter and others in their professional networks to see if they were interested in joining the Board.
- The St. Louis Chapter advertises for Board members through its newsletter (<u>Appendix</u> <u>C</u>) and on their <u>website</u>.

Staggering term end dates for partial board turnovers and including a transitional period can help with the integration and succession of Board members; if possible, allow retiring officers to stay on the Board as ex-officio members to ease the transition. Setting clear and realistic expectations for the Board ensures that all Board members are fulfilling their role.

The Georgia Chapter conducted an attendance analysis and instated a requirement that their officers attend 75 percent Board meetings and other events to ensure continuity on the Board.

Although this is a volunteer position, chapter officers and board members should be committed to their position and be engaged throughout their term. To help ensure chapter officers do not experience burnout, identifying each officer's role and sharing the workload is imperative. Utilizing a task list helps ensure that the work is evenly spread across board members. The Colorado Chapter has shared their <u>task list</u> as an example for other chapters. Chapters should also consider having co-chairs for board positions to share the workload, encourage teamwork, and ensure at least one person is available for board meetings or tasks.

#### **Board Succession and Avoiding Board Burnout: Lessons Learned**

- **Set a clear succession plan** and transitional period as new board members join.
- **Utilize a task list** to distribute the workload among all board members.
- Consider having two board chairs per committee to share the workload.
- Decide on a percent of participation required for board members.

### **Appendices**

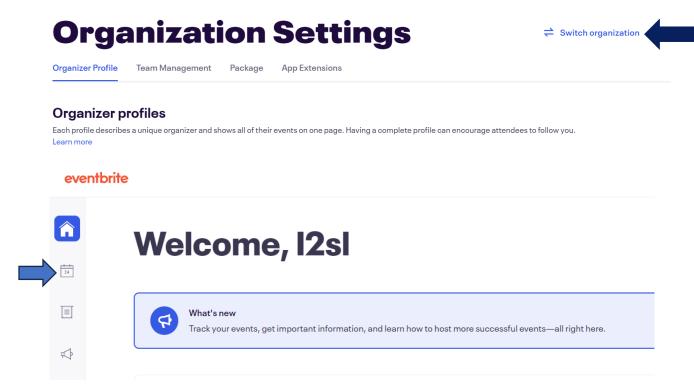
#### **Appendix A: Setting Up a Chapter Eventbrite Account**

- 1. First, you need to create a free, chapter account with Eventbrite if your chapter doesn't have one already at <a href="https://www.eventbrite.com/signin/signup">https://www.eventbrite.com/signin/signup</a>. Once your account is in place, please let I2SL HQ know which email was used to create the account. If the chapter already has an existing Eventbrite account, please email <a href="mailto:info@i2sl.org">info@i2sl.org</a> to let us know which email the account is under.
- 2. Once the chapter's Eventbrite account is set up, I2SL HQ will assign the chapter as a user in I2SL HQ's Eventbrite account. Once assigned as a user, the chapter will receive an invitation to join via the email

email address (ex. arizona@i2sl.org) to create an account. This will make it easier to keep track of login information and will allow future chapter officers to access the account. If you don't know if you have a chapter email account or would like to have one, please email info@i2sl.org.

address used to create the Eventbrite account. When you receive the email, click **Get Started**. A web page will open in your browser, then click **Accept**.

3. If your chapter has an existing Eventbrite account, you may have to select **Switch organization** and then select "I2SL" to change the account from your existing one to I2SL's. You should see "Welcome, I2SL" at the top of the home page once you have been switched to I2SL's organization.



4. To create an event, select the calendar icon on the toolbar found on the left-hand side of the screen. Then select **Create Event**. Enter your event information.

5. After entering your event's date, time, and location, add tickets to register attendees and collect funds from them. You have the option to create a paid or

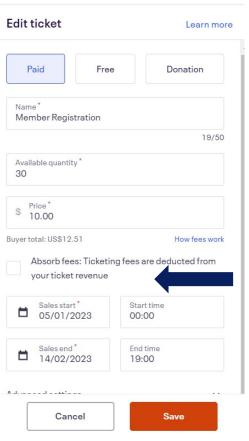
free event, or even set registration so attendees can donate what they wish. You'll need to name the ticket type, add the number of tickets you want to be available, and the price.

6. If you want to add multiple types of tickets at different prices (for example, member and nonmember tickets), just click the *Add tickets* button and add the information for the new ticket. Eventbrite charges a service fee of 3.7 percent + \$1.79 per ticket and a processing fee of 2.9 percent per order (an order being the entire group of tickets being purchased). For example, if someone buys one ticket that costs \$100, Eventbrite will assess a fee of \$8.55 and the payout to the chapter will be \$91.45. However, these fees can be passed onto the purchaser making their total \$108.55, so that the chapter receives the full \$100 in its payout.

**NOTE:** Eventbrite gives you the option to absorb ticket fees (which will then be deducted from your net event revenue) or add the fee to the cost of the ticket for attendees. In order to receive the full amount of your ticket cost, do **not** click the button that says, "Absorb fees." Attendees will then be charged the Eventbrite fee on top of your registration rate, and your chapter will make the full amount.

- 7. The last step is publishing the event. Before you make the event available to the public, you can click **Preview** to open the event in a new window and see how it will look to those registering. Once you are satisfied with your event, click **Publish**. People will now be able to see your event on Eventbrite and you can begin promoting your event.
- 8. One you publish/promote an event and people start registering, you'll be able to see all your financial information on the Dashboard. From the Home/ Overview page, find your event and click on it. Then select **Dashboard** on the side control panel to view your event's ticket sales. You can also access attendee reports toward the bottom of the page.

**Best practice:** Please use your chapter name as the Organizer so our bookkeeper and others accessing the Eventbrite account know which events belong to which chapters.



Best practice: After publishing an event, email <a href="mailto:info@i2sl.org">info@i2sl.org</a> and copy <a href="mailto:kathleen.brady@erg.com">kathleen.brady@erg.com</a>; once you get a payout from Eventbrite, HQ can allocate the funds to the right chapter.

# Publish Your Event Test Event Tuesday, 14 February 2023 at 19-00 EST 1000 For Dequeene Boulevard, Pittsburgh, PA 15:222 Solon Sol

I2SL HQ has linked its bank account information to Eventbrite. All payments from chapter events will be deposited into I2SL HQ's account, and our bookkeeper will allocate funds to the appropriate chapter, as long as you make it clear when you set up your event! For tips and tricks on increasing engagement, selling more tickets, and more, check out Eventbrite's blog. If you have any questions about I2SL's Eventbrite account, please email <a href="info@i2sl.org">info@i2sl.org</a>. You can also use Eventbrite's Help Center to find more help articles for using Eventbrite.

NOTE: Some—but not all—states offer sales tax exemptions for nonprofits. Chapters should be aware if their state requires sales tax be collected by Eventbrite on event fees; the list of state exemptions are explained here.

### **Appendix B: American Institute of Architects Continuing Education Credits**

Chapters should submit a completed <u>AIA Credit Request form</u> to I2SL at least four weeks in advance of their event if it has an educational component worthy of continuing education learning units. This allows time for I2SL to process the credit request, for AIA to approve the request, and for the chapter to promote that credits are being offered.

- Provide a course title, description, four leaning objectives, and event date/time.
- I2SL will notify the chapter once the AIA credit is approved, which can take up to 10 business days after I2SL submits the request.
- Download and copy the <u>I2SL Chapter Attendance Form</u> and ask attendees to fill it out during the training. The form asks AIA members to include their AIA number or email address on the form so they can receive AIA credit for their attendance.
- After the session, email the completed attendee form to <u>info@i2sl.org</u>. I2SL will process credits for all AIA members.

For non-AIA member attendees, chapters can either make certificates for all attendees using this <u>certificate template</u> or ask attendees first if they would like a certificate to self-report. Feel free to adjust the attendance form to include a field that asks attendees if they would like a certificate of completion so they can self-report their credits.

### **Appendix C: Sample St. Louis Chapter E-Newsletter Content Screenshots**



#### We want your feedback!

The I2SL chapter is conducting a membership survey and we would love your feedback!

This valuable information will help inform our programming and outreach over the coming years. Click the blue button below to fill out the quick survey and be entered to win a \$25

Amazon gift card!

MEMBERSHIP SURVEY





# freezer challenge

Join the International Laboratory Freezer Challenge!

This fun, free program, a partnership between My Green Lab and the International Institute for Sustainable Laboratories (IPSL), leaches you how to be more energy efficient with their lab's cold storage, improve sample accessibility, reduce risk, and save costs for their institutions. Second only to fume hoods, your lab's cold storage (refrigerators, freezers, cold rooms) is likely the next biggest category of energy consumers in your lab space. Ready to do something about that?





The Neuroscience Research Building under construction on the Washington University Medical Campus promises great discoveries in an environmentally friendly building that meets sustainability goals. The completed structure will contain energy-efficient, low-energy research freezers in laboratories; electric charging stations in the parking garage; and numerous other sustainability-focused elements. Learn more...

USGBC-Missouri Gateway Chapter is excitedly rebranding to Missouri Gateway Green 
Building Council! The new name keeps ties with 
USGBC and ensures the name is welcoming to 
and encompassing of the entire St. Louis 
metropolitan area - including Southern Illinois as 
well as the former Missouri Heartland Chapter 
territory from our Mid-Missouri Branch in 
Columbia & Jefferson City to our Ozark Branch in 
Springfield, MO, Learn more at their new site 
www.mogreenbuildings.org.

#### Other News and Events

Bookmark our <u>events page</u> to stay up to date on all upcoming events in the St. Louis Region.

Keep an eye out for our newsletters including announcements for our webinars.

Please share with your colleagues and friends and encourage them to join the chapter and sign-up for the newsletters to stay connected!

Have questions? Feel free to reach out to any of our board members about I2SL and lab sustainability!

A special 'Thank You' to our founding sponsors!

**HERA** laboratory planners



::Fundermax



Want to see your company's logo here?

<u>Click here to sponsor this chapter!</u>

#### Sponsor the I2SL St. Louis Chapter!

Are you interested in supporting the IPSL St. Louis Chapter? If so, become one of our sponsors!

We encourage you to join as a founding sponsor! This is a one-time opportunity that will be limited to the first 10 sponsors who sign-up at the founder level. Don't miss out on this opportunity, sign up today!

Your sponsorship will support our goals to promote sustainable lab design and practices across the St. Louis region through collaboration with like-minded professionals in industry, lab design, and construction.

Sponsorships are annual and end 1 year from the date of sponsorship.

Become a sponsor now!

For more details on different sponsorship levels, please visit our  $\underline{\text{Sponsorship webpaqe}}$