



I²SL Chapter Kit
A Guide for Creating an I²SL Chapter
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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:

- Promote resource-effective and environmentally-responsible facilities for science education, testing, medicine, and research and development through advanced and sustainable design, engineering, and operational practices.
- Encourage the development of technologically advanced, energy-efficient, and environmentally-responsive laboratories and related high-tech facilities throughout the world.
- Facilitate a sustainable "whole-building" and systems integration approach in designing, engineering, constructing, operating, and using laboratories and related facilities.

With its mission rooted in the goals of the Laboratories for the 21st Century (Labs21[®]) program, I²SL was selected to be the official cosponsor of the Labs21 Annual Conference and Workshops until 2010 when the program was completely given to I²SL. By leveraging this responsibility, I²SL HQ now facilitates a network of technical capabilities to address global needs in the following areas while incorporating a whole-building approach to sustainable, high-tech, and low-energy laboratories. These capabilities include:

- Offering project-specific technical assistance and charettes
- Sharing new technologies through customized training and workshops
- Developing case studies and best practices
- Conducting conferences and networking to encourage change within the industry
- Coordinating initiatives within the community of service providers, owners, and laboratory personnel

Why Start an I²SL Chapter

I²SL seeks individual leaders and organizations to share in the rewards of creating and promoting more sustainable 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 the chapter area of activities to promote the mission and activities consistent with those of I²SL HQ.

Chapter Benefits

- Permission to be branded as an I²SL Chapter.
- Exclusive use of the registered trademark 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.
- Dedicated page on the I²SL website where information provided by the chapter, including its activities, is posted with a link to the chapter's self-hosted website, once available.
- 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 collect, bank, and distribute funds upon request from the chapter.
 - I²SL will not be responsible for ensuring sufficient chapter operating funds. This responsibility lies specifically with the chapter's Board of Directors.
- Opportunities to raise chapter operating revenues through regional 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.
- I²SL HQ web page of resources available to chapters. Frequent refresher messages are sent around to help chapters in their planning and activities.

Upon request, I²SL HQ offers the chapter the following services at an additional, to be determined, cost:

- Access to I²SL's workshops as a revenue sharing opportunity. Workshops will be offered upon request and may be taught by an I²SL-approved chapter instructor.
- Early assistance in planning an I²SL Chapter event. I²SL would participate in one kick-off meeting during which I²SL would provide the chapter with logistical guidance for organizing and promoting the event.
- Manage registration for chapter events.

- Access and ability to share with chapter members any materials I²SL maintains.

Chapter Structure

All I²SL Chapters will operate under the 501(c)(3) tax “umbrella” of the headquarters organization (except 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, a chapter 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 might have their own country’s laws and regulations to satisfy. The chapter, not I²SL, is responsible for meeting such obligations. I²SL will not include tax-related services in international [chapter annual fees](#).

Chapter Requirements

Reporting

- Submit to I²SL, as requested below, the following required documents:
 - [Chapter Event Report Form](#). This form must be used by I²SL Chapters operating under the “umbrella” of I²SL HQ’s 501(c)(3) tax status and will be due within 30 days of a chapter event for which sponsorships were received, funds were collected, and/or expenses were paid. Note: The information requested in the chapter event report form can be submitted in alternative ways such as scanning and submitting a hardcopy attendance sheet and copies of receipts and invoices, noting if any need to be paid or reimbursed. Additionally, if a chapter utilizes a direct deposit system (e.g., Event Brite or Square), those direct deposit funds must be reported to I²SL HQ within 90 days or they will be released for use by I²SL HQ. *This form is not required of international chapters.*
 - 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. It shall be the duty of the chapter officers to furnish the I²SL Board of Directors a complete list of the 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 its Board of Directors.

- Chapter Promotional Messages, Newsletters, and Publications. Chapter newsletters or publications must be previewed by I²SL HQ two weeks prior to their issuance.
- Activity Reports. From time to time the I²SL HQ Board of Directors may request reports on chapter activities. A reasonable time will be negotiated for submitting any requested report.

Payments

- 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 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 site, maintenance of mailing lists, processing and managing American Institute of Architects (AIA) credits, and proofing materials. 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 on March 31, given the following:
 - Non-membership chapter revenues are defined to include conference registrations fees (individual and corporate), training revenues, and chapter sponsorships. Revenue from chapter membership dues will not be considered when deducting the 10% gross revenues.
 - Exempted from the 10% payments are government and educational grants received by the chapter as well as donations received strictly for student scholarships.
 - 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.

- 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.
- 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 promotion.
- \$900 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. *Not applicable to international chapters.*
 - 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.
 - This fee will be invoiced by I²SL HQ at 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 I ² SL Chapter	\$1,600 \$1,200 for international chapters
Chapter Annual Operation Fee (including international chapters)	Annual fee to be paid upon invoice from I ² SL HQ at close of I ² SL's fiscal year on March 31. <i>Chapters that are approved after October 1 are not subject to this fee until year*.</i>	10% of chapter gross revenue (minimum \$300)

Chapter Annual Accounting Fee <i>Not applicable international chapters.</i>	Annual fee to be paid upon invoice from I ² SL HQ at beginning of the chapter's second operating year*.	\$900
* A chapter's operating year begins on the date the chapter received official approval from I ² SL HQ's Board of Directors.		

Representing I²SL

- Accurately represent I²SL by following I²SL's logo use guidelines and employing its mission statement.
 - 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 in marketing of products or services to others without the written consent of chapter officers and the I²SL HQ Board of Directors.
- Share with I²SL HQ any technical training materials, case studies, best practices, tools, and other technical documents created by the chapter (these materials will need to be reviewed by I²SL HQ in advance of publication) for promotion and use by others.
- Promote the I²SL Annual Conference.
- Promote I²SL workshops, webinars, and other training opportunities as appropriate.

Chapter Administration

- 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. To address this dilemma, I²SL HQ began accepting interest from groups wanting to establish a local chapter as a grassroots vehicle for wider dissemination of the latest industry knowledge. These groups also saw the chapter as an opportunity to network with other professionals in their local markets. Local chapter educational events can be especially valuable for training younger professionals or to provide needed continuing education credits for established veterans. As I²SL membership and the chapters grow, this helps strengthen and sustain I²SL and its mission.

- Invite a member of the I²SL HQ Board of Directors to present and participate in at least one chapter meeting annually and conferences or programs 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.
- Schedule regular chapter meetings to conduct chapter business.
- Consider developing chapter-specific bylaws. [I²SL HQ's bylaws](#) and [various chapter bylaws](#) are available as examples.
- Notify I²SL HQ in writing at least two months before the chapter desires to undertake any I²SL Chapter activities that involve revenue sharing, including but not limited to offering I²SL workshops, holding a country/regional/city conference, or using any I²SL tools that may require I²SL HQ support.
- Chapters are required to submit financial reports as found in [I²SL Chapter Report Form](#) for any event and other activities that may generate 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/globalcommunity/becomemember.html 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 its activities. These fees shall be collected directly by the chapter.

Starting an I²SL Chapter

The following steps must be completed in order to start an I²SL Chapter:

1. Contact info@i2sl.org if you have read this Chapter Kit 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.
 - a. 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 of I²SL's Chapter Kit
 - b. Group's 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 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.

How to Become Chartered as an I²SL Chapter

In order for a chapter to be chartered, a completed [Chapter Charter Application](#) must be completed and submitted to I²SL HQ. A completed Chapter Charter Application will include a:

1. Contact list of the chapter's founding Board of Directors officers
2. Petition for chapter charter, including confirmed I²SL membership by all signers
3. Signed Chapter Agreement

All materials should be submitted to I²SL HQ at:
I²SL
c/o Kathleen Brady, Executive Director
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.