

Local Chapter Handbook

Updated 2022



A community of benefits professionals

Welcome!

This handbook offers ideas, suggestions and other forms of support. It is not intended to be all-inclusive. Local chapters should adapt the ideas in the handbook to meet their own unique needs. The staff of the International Society of Certified Employee Benefit Specialists is always available to provide additional assistance, information and support. This handbook is designed for use by local chapters to assist them in achieving the goals of the International Society and is available on our website as well.



International Foundation of Employee Benefit Plans

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.

As an objective, nonprofit educator, the Foundation offers educational programs, an information center, books and periodicals, research surveys, a searchable online database, virtual learning and the CEBS program.



Certified Employee Benefit Specialist® (CEBS®) Program

The CEBS designation is a five-course program covering the entire spectrum of total benefits. Two specialty designations—the Group Benefits Associate (GBA) and the Retirement Plans Associate (RPA)—can be earned by completing specific courses in the CEBS curriculum and are excellent stepping-stones toward earning the CEBS designation. In the United States, CEBS is a joint program of the International Foundation and the Wharton School of the University of Pennsylvania. In Canada, CEBS is cosponsored with Dalhousie University.



International Society of Certified Employee Benefit Specialists (ISCEBS)

The Society is a nonprofit educational organization open to those who have earned the CEBS, GBA or RPA designation or are CEBS students. It provides continuing education and networking opportunities through an online community, educational programs, resources and publications reaching nearly 3,000 members.

Table of Contents

Local Chapters of The International Society	3
Officers and Board of Directors	4
President	5
Vice President	6
Secretary	6
Treasurer	7
Committees	8-11
ISCEBS Support Services	12
Reporting	13
Guidelines, General Policies and Bylaws	14-15

Local Chapters of the International Society

At the local level, educational programs and other activities are offered for professional development through Society chapters in the United States and Canada. To be a full member of a local chapter, an individual must be a CEBS graduate or student and also a member of the Society.

Chapter Goals:

- Provide continuing education opportunities through educational programs addressing timely and critical benefit issues at meetings and seminars
- Offer an exchange of information among employee benefits professionals at the local level
- Support candidates in their pursuit of the Certified Employee Benefit Specialist (CEBS) designation
- Promote CEBS Compliance
- Enhance the visibility of the CEBS designation in the local community
- Recruit and retain members



Explore the Local Chapters Tab on www.ISCEBS.org to find important web pages.

- ▶ **Chapter Resource Center** is a collection of best practices, templates and other information to help all volunteers. Information is updated regularly, so check back often.
- ▶ **Chapter Leader Discussion Forum** is an exclusive benefit for chapter volunteers. It is a great opportunity to ask questions, share your experiences and network with other chapter champions.
- ▶ **Chapter Benefits Basics Boot Camp** is a compilation of marketing materials, session descriptions and presentations to aid your chapter in developing a full- or half-day education session.
- ▶ **Chapter Performance Award** is a simple checklist of items and time frames to guide your chapter through the year. Chapters that complete their tasks in a timely manner will be rewarded for their efforts.
- ▶ **Chapter Leader Toolkit** provides tips and training specific to each role on your board. It is updated with relevant information to help your board members feel comfortable in their role.

Officers and Board of Directors

	Officers	Board
	President Vice President Secretary Treasurer Past President	Committees
Membership Requirements to Hold Position	<ul style="list-style-type: none"> • Be a CEBS graduate • Be a member of ISCEBS • Be a member of the chapter 	<ul style="list-style-type: none"> • Be a CEBS graduate, GBA or RPA designee, or a CEBS student • Be a member of ISCEBS • Be a member of the chapter
Term of Service	<p>Officers are elected for a term of one year only and shall not succeed himself or herself in the same office.</p> <p>The president will then serve on the board as the past president and, therefore, the president of the chapter shall not be eligible for reelection as an officer of the chapter for a term commencing less than one (1) year after the expiration of their term as president. The president should also not serve as a committee chair until the end of their term as past president.</p>	<p>Directors are elected for a term up to three (3) years. When a board member's term expires, they are unable to hold a position on the board for the year following their previous term. An exception will be made when the election of such member was made to fill a term of one year or less, in which case such member shall be immediately eligible for reelection. When the chapter is created, board members at large are elected in staggered terms, which shall continue so that new board members fill expired positions each year, while others remain for consistency.</p>



President

Project Management

Set Priorities

Your term of office is limited, as is the time you and your board will be able to devote to chapter activities. As a result, it is very important to decide what you want to accomplish within your time frame. Remember that the overriding goals of the Society and the chapter are to maintain and promote the integrity of the CEBS designation and promote CEBS Compliance. A secondary goal is to increase membership while retaining existing members.

Set Up Committees, Delegate and Utilize Opportunities for Participation

Most chapters have at least three committees to accomplish the chapter's goals. Common committees are membership, education and audit.

These committees achieve four objectives:

- 1 They allow the president to delegate some of the responsibility and the work.
- 2 They involve more people in the chapter.
- 3 They allow the board members to judge and groom future leaders.
- 4 They can help coordinate tasks so the chapter works most efficiently and not one committee or person does all the work.

Assign and Oversee Tasks and Time Frames

Each board member, committee chair and committee member should have a clear understanding of what is required of them. Each person should know when each task is to be completed. The president can monitor each position and assignment and provide reminders, encouragement and/or help when it is needed.

Preside at All Meetings

It is expected that the president will lead (or moderate) all educational and board meetings. Of course, there will be times when other commitments or circumstances make it impossible to do this. That is when the vice president is expected to fill in.

Communicate With Membership

Regular communication keeps members informed, shows off chapter accomplishments and provides visibility for chapter events. Possible topics might include listings of new graduates and Fellows, summaries of recent meetings, announcements of upcoming meetings, interviews with members, and chapter and/or Society news.

Maintain Contact With Society Headquarters

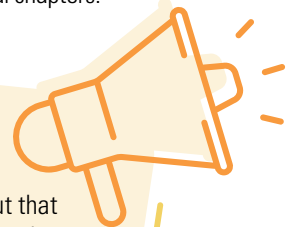
Chapter communication with the Society is vital to the chapter's success. The president should determine how much of the correspondence they will do and how much will be delegated to the secretary. One of our major strengths is the fact that we can share information. The Society serves as the conduit between the local chapters.

Act as Prime Motivator

It is difficult to get people to share their valuable time without compensation, but that is the role of volunteer leaders. It is up to the president to lead in such a way that the members will want to continue their involvement. Chapter presidency will give you the chance to learn skills that will be assets to your career.

Develop Successors

Developing successors is probably one of the most important but underrated duties: A chapter will not survive if each period of strong leadership is followed by weak or nonexistent leadership. You should get to know your members and then get as many involved as possible. When people have been identified as potential leaders, the ideal path is to have them work on a committee, chair a committee, become a board member, then become an officer and finally assume the presidency.



Vice President

Substitute for Times When President Is Unable or Unavailable

The vice president is the second-in-command and should be prepared to assume any of the president's duties when that person is unable to do so. It is important that the vice president keep up to date on the chapter's activities so that they can step in immediately.

In Many Chapters, the Vice President Is the Program Committee Chair

To prevent this position from being considered a "lame duck" office, many organizations appoint the vice president to be the program committee chair. This is beneficial to the chapter as well since it involves a board member overseeing the program committee. This helps prevent the committee from planning inappropriate meeting topics or speakers.



Could Be Considered President-Elect

Many chapters consider the vice president the president-elect. This provides continuity and allows the president to groom their successor. Some chapters prefer not to formalize this in any way, in spite of the fact that the vice president often succeeds the president.

Secretary

Minutes

The secretary is responsible for taking minutes at all board meetings and at the annual meeting. Special note should be made in the minutes of those who either volunteer or are assigned duties, indicating who is to do what and by what deadline. This person is also responsible for distributing the minutes electronically to the board members and Society as quickly as possible, preferably prior to the next board meeting.

The secretary is also responsible for keeping the permanent records of the chapter. (These can be forwarded to the Society for safekeeping and to ensure they are always accessible to the chapter.) These records should be maintained so they are readily available to their successor. In addition, the secretary is the chapter's official correspondent. Each president will determine how much of the correspondence will be done personally and how much will be delegated to the secretary.

Some secretaries are in charge of the chapter meeting notices and/or the chapter newsletter. Each chapter should decide how these duties are to be divided.

Reporting for Society

Annual

The secretary is responsible for notifying Society headquarters of new officers by January 15. In order for the Society to maintain close contact with the chapters, it must know to whom the correspondence should be directed. It is required that the minutes of the annual meeting be sent to the Society.

Periodic

The secretary should send the Society the minutes from each board meeting. The Society should also be sent copies of any meeting fliers and newsletters not produced in Brookfield, Wisconsin.

Membership Lists

Chapter membership lists are available from the Society at any time. The secretary should forward any address changes to the Society. Please keep us informed of these moves so our records are as current as possible and the chapter database will be up to date.

Electronic Storage/Cloud Storage

As technology changes, chapters are encouraged to review available options. One such area is information storage. Electronic or cloud storage is now more common and readily available. Cloud storage offers virtual storage for a nominal fee or, in some instances, no fee.

Whatever option is selected, the board should all be in favor. Technology changes rapidly, so no providers will be recommended here. Contact the Society for suggestions or to discuss options.



Treasurer

Budget

Each year, the treasurer prepares a budget in accordance with the direction of the board. For many chapters, this will not be an elaborate document. However, the process will be beneficial to all chapters, as it will help prioritize the projects that the board hopes to accomplish during that year. A financial report can be prepared for presentation at board meetings in addition to the educational program recaps of income and expenses. Samples of these documents are available in the Chapter Resource Center (www.iscebs.org).

Dues

The treasurer will work with the Society on dues collection and billing. Dues notices are mailed in early fall, so the chapter treasurer must notify the Society by August 1 if the chapter's dues rate has changed. The Society sends each chapter a membership roster with those graduates and students who have paid dues.

The Society will send dues payouts to the chapters two to three times per year, as necessary. Funds will be electronically transferred to the chapter's bank account unless otherwise specified. Please confirm your banking information with the Society each February so the process is as seamless as possible.



Checking Accounts

There are various forms of checking accounts (e.g., regular, interest-bearing, etc.), and each chapter should review its accounts periodically to determine what best meets the chapter's needs. In addition, if it appears that the chapter is building a reserve, the treasurer can recommend to the board other investment vehicles such as certificates of deposit.

Online Banking Account

Chapters have the option to set up an online banking account to accept credit card payments for education programs. These services may charge a nominal fee, and the board should approve any vendor selected. Contact the Society with any questions about online credit card services.

Group Tax Exemption

The International Society has secured a 501(c)(3) group tax exemption for its U.S. chapters. The group exemption has eliminated the need for each individual chapter to file its own tax exemption application with the IRS. To maintain a group exemption, the Society is required to file an annual report. Information for the annual group exemption filing will be sent to the U.S. chapter presidents by **July 15**, and the signed documents must be forwarded to Society headquarters no later than **September 1** of each year.

Canadian Chapters

Non-Profit Organization (NPO) as determined by Revenue Canada may need to file a Form T1044 if total assets for the organization were more than \$200,000 at the end of the immediately preceding fiscal period. If the chapter does not already have one, a Business Number (BN) may be requested at www.cra.gc.ca/bro. Additional information is available at www.cra.gc.ca.

Employer Identification Number (EIN)

Chapters must have an EIN to open a bank account. If you are not sure what your number is, you might want to check with your chapter's bank or the Society.

State Tax Exemption

Nonprofit educational organizations that are recognized as exempt from federal tax may be able to qualify for state tax exemption as well. If your chapter has not already filed for state tax exemption, you may want to do so. Consult either your state or legal counsel about how to attain exemption. The only way a chapter can avoid paying any kind of sales tax is by having a **state** tax exemption.

Committees

Depending on different factors, a chapter may have no formal committees or may have any combination of the following committees. The chapter may find that the duties overlap or that they may want to distribute them differently among the committees. The following should be considered **general** guidelines only.

Membership Committee

This group is responsible for recruiting new members and for retaining existing members. The committee should be composed of members and affiliates with an eye toward grooming leaders and increasing chapter participation.

New graduates and students are an excellent source of new members each year. The committee should plan a major recruiting effort to coordinate with the Member Challenge. Chapters will be notified when someone joins the Society and chapter. Chapters should also check "Members on the Move," which records individuals who may have moved into your area recently. Personal contact should be made with those who are likely candidates for local chapter membership.

Society membership renewals are mailed in October. The chapters are notified regularly of the renewals from their area. Nonrenewals should be contacted as quickly as possible in order to retain them as members.

To facilitate and encourage recruiting and retaining members by the chapters, the Society conducts a Member Challenge each year. This allows the chapter to:



Determine the chapter's nonmembers (CEBS graduates and students who haven't renewed or who graduated the previous year without joining)



Recruit new members for the chapters and for possible committee positions



Conduct an informal survey on how the chapter could better meet potential members' needs



Help clean up the mailing list



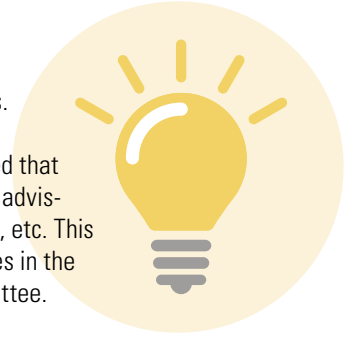
Earn an incentive from the Society if the chapter meets a preestablished goal.

Chapters are sent Member Challenge materials in November. We continue to find that the Member Challenge and outreach efforts made by volunteers are the best ways to increase membership.

Committees (continued)

Education Committee

The bylaws require that chapters conduct three (3) educational meetings a year that are of value to the members. Many members rely on these meetings as a source of continuing education. Because the educational programs provide such high visibility for the chapter, they deserve a great deal of attention and planning. It is recommended that someone from the board either head the program committee or attend planning sessions as an advisor. It is also advisable to have committee members from several benefits sectors such as insurance, finance, consulting, corporate, etc. This ensures that the programs will be well-balanced and appeal to the broadest audience. If your chapter participates in the Chapter Webcast Committee, one of your three educational meetings per year may be coordinated by the committee.



Deciding on Topics

Topics should be varied across categories (pension, health and welfare, compensation, retirement, etc.). Usually the committee is aware of current hot topics and can always look to the Symposium speakers for inspiration.

Finding Speakers

Meetings should be educational and not a sales opportunity for the speaker. It also helps to have speakers who are known in the employee benefits community to ensure they have information to share and are good presenters. Avoid featuring speakers from the same insurance company or same consulting firm since it might appear that the chapter is endorsing that firm.

When

In recent years, technology has expanded to allow chapters to offer educational programs virtually. This lends itself well to a program at the beginning of the day or over the lunch hour or a social toward the end of the day. It is advisable to stay consistent with the timing of your educational programs so your audience can plan accordingly.

Where

Where the chapter holds in-person meetings should be reviewed regularly. There's no one best location for every chapter, so find what works best for your area.

Cost

It is important to know exactly what the meeting is costing the chapter. Set a fee to cover all expenses. Some chapters only charge for nonmembers, which serves as a perk of belonging to their chapter. Free education all year for the price of chapter membership is valuable!

Program Emails and Website Updates

The Society can create a program announcement and send it on behalf of the chapter, free of charge. The email will be sent to chapter members, graduate and student nonmembers and inquiries in the chapter area that have opted to receive emails. The Society will also add a page to your website, if applicable, to set up registration.

Evaluations

Session evaluations are vital to future planning efforts. Whether electronic or paper, chapters should utilize evaluations. The Society can assist with sample evaluations.

Joint Sponsorship of Programs

Such an arrangement can be beneficial to the chapter, so long as careful thought is given to the benefits and liabilities of working with an outside group. *Under no circumstances should a mailing list received from the Society be given to a group outside of the Society.* An alternative would be to host an event with another ISCEBS chapter.

Continuing Education Credits

There is a benefit to chapters offering a variety of continuing education credits. There may be fees associated with filing for approval, and decisions should be approved by the board.

CEBS Compliance Credit

Chapters are encouraged to promote the number of CEBS Compliance credits available at each program. Credits are figured based on a 50-minute hour. While not required, chapters are encouraged to provide a compliance certificate to any graduate requesting one. All chapter education programs qualify for CEBS Compliance credit.



Insurance Producer Credit

Each province and state has its own requirements for insurance producer continuing education credit. Inquiries and applications should be submitted directly to the insurance commission. Contact the IFEBP CE Department as soon as possible—at least 90 days prior to the event if you'd like to explore the possibility of offering insurance producer credit. There may be a filing fee. Contact the IFEBP Continuing Education Department for additional information at continuing@ifebp.org.

CHRP/SHRM/HRCI

Obtaining credit for human resources groups is a great way to cover a larger part of the benefits/HR market. Each organization has its own filing requirements and potential fees. Information is available on each organization's website. Contact the IFEBP Continuing Education Department for additional information.



Other continuing education credits may be obtained for common professions or designations in the chapter market. These provide great cross-promotion opportunities and should be strongly considered by the board. Filing fees may apply.



Committees (continued)

Fundamentals Programs

Chapters currently presenting fundamentals programs have found them to be beneficial for many reasons:



They showcase the chapter as an excellent resource for benefits education.



The courses are a good introduction to CEBS.



The programs are a worthwhile source of additional revenues to fund other chapter projects.

The most successful approach has been to hold two one-day sessions: one on health and welfare and one on retirement plans. Each program is divided into five one-hour segments. Having different speakers volunteer to take each section means that no one is burdened with an enormous time commitment, which makes it easier to recruit presenters.

In states where it is applicable, chapter organizers have applied for continuing education credit for insurance agents, brokers, lawyers, accountants, etc., and have found this can increase attendance. Filing for continuing education must be done 30-90 days in advance, so planning ahead is very important. Most states require a copy of the handouts, speaker bios and a filing

fee. If you have questions about how or where to file for continuing education, please contact the Society.

Check out the Chapter Benefits Basics Bootcamp page on the Society website for fundamentals programming ideas.

CE Days

Several chapters offer what they call "CE days" which is a one-day program focusing on more advanced topics, providing several hours of continuing education credits. Each chapter would file for CE through their state. Examples of CE day programs are available through the Society.

Public Relations Committee

Newsletters

A newsletter can be an excellent member service and increase the chapter's visibility. Some of the features might include announcements of upcoming meetings, profiles of members, job postings, and chapter and Society news. Members seem to prefer a newsletter that does not have technical information but rather information about members, such as new graduates and "Members on the Move." A newsletter can make members feel a part of the chapter, and it keeps the members informed of the chapter's and members' accomplishments. The Society can provide sample articles and assist in the design. A newsletter can be mailed, emailed or posted on a website.



Social Media

It is advisable to have a social media presence on whatever platforms make the most sense to the board. It is not imperative to be on every site, nor should a chapter. What is important is for posted information to be current and timely and posted consistently. A committee can ensure consistent posting and share the posting workload so no one member is always taking care of this aspect of chapter management.



Press Releases

It is possible for the chapter to get free publicity by sending press releases to the local media and online publications. The first effort should be made after new officers are elected. It is even more effective if pictures are included. You can request sample news releases prepared by the International Society. Feel free to use this language or develop your own.

Recognition

Commonly, the outgoing president is given an item of recognition, such as a plaque (the Society can help with this). Please contact the Society for a recognition item order form and consider gifting something to recent grads as well! Alternatively, chapters can sponsor a graduate to attend an education program or give them a "free" meeting coupon.

Committees (continued)

Nominating committee

Each year, the nominating committee is responsible for soliciting nominations and presenting a slate of candidates for all officer positions and those board of director positions that become vacant due to rotation, resignations, etc., for election at the annual meeting.

In keeping with the bylaws, the committee consists of three members who are appointed by the president, with the approval of the board of directors. One member is the designated chairperson.

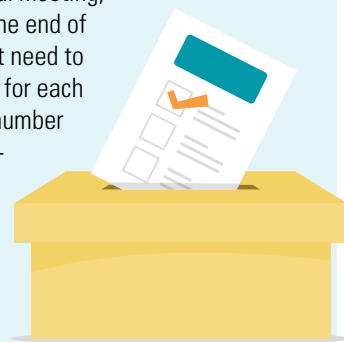
Not less than **ninety (90) days** prior to the annual meeting, the committee should solicit recommendations of nominees from the members for the offices and for the board of director positions to be filled at the annual election. Most chapters hold their annual meetings in December, so this process generally begins sometime in September.

The committee will announce its nominations for the offices of president, vice president, secretary/treasurer and members of the board of directors to the membership not less than **forty-five (45) days** prior to the annual meeting. For a December annual meeting, this would be in October.

Additional nominations may be made by any group of not less than the number of members specified in the chapter's bylaws. These nominations should be personally signed by all nominating members on one sheet and forwarded to reach the chapter secretary not less than **thirty (30) days** in advance of the annual meeting. A statement from the candidate indicating willingness to serve must accompany the nominating petition.

The final list of nominees, if changed from the original announcement, must be sent to the membership not less than **ten (10) days** prior to the annual meeting.

Election of officers and members of the board of directors should take place at the annual meeting, which **MUST** be held before the end of the year. (The meeting doesn't need to be in December. The nominee for each office receiving the greatest number of votes, whether or not a majority of all votes cast, will be declared the successful candidate. If more than one member shall be nominated for any office, written ballots will be cast.



Officers and directors will assume the duties of their offices at the beginning of the fiscal year following their election, as required. Since the Society and chapters' fiscal year is also a calendar year, **the terms of office begin January 1.**

Audit committee

Each year, the audit committee should conduct a review of the chapter's finances and make a report to the board of directors. This committee of two or three people must not have any direct responsibility for the day-to-day receipt and disbursement of chapter monies. So no board member can be on the audit committee. Detailed guidelines for conducting an audit may be obtained from the Society.



ISCEBS Support Services

Annual Dues Collection

The Society will bill and collect chapter dues for members as part of its annual dues billing process. Chapters must notify the Society of their annual dues amount no later than **August 1**. The Society mails annual dues billings in **October**. The chapter president will receive a membership roster reflecting the dues status of chapter members. The chapter treasurer will receive the same roster as well as notification of any monies applicable to chapter dues in **March**. Additional dues collected by the Society after **March 1** and applicable to chapter membership will be forwarded as appropriate.

Recognition Items

The Society makes various recognition items available to the local chapters. A recognition item order form is available from the Society (www.iscebs.org). **Remember that items with the CEBS logo may not be given to individuals who do not hold the Certified Employee Benefit Specialist designation.** Since items with the Society logo may be given to anyone, we recommend using these items.



Chapter Stationery

The Society can provide chapter stationery for your meetings. Chapters wishing to order their stationery locally may do so. **All chapter stationery differing from the official design must have prior approval from the International Society.**

ISCEBSLink

In the members' only section on the Society's website, you can access ISCEBSLink, which is a discussion board for members. There is a group specifically for chapter leaders where announcements from the Society are made and you are able to bounce ideas off of other chapter leaders. Leaders can share helpful documents and advice to help support each other.

Annual Volunteer Forum

The Society holds a one-day conference each year for chapter volunteers. Chapters are invited to participate and are encouraged to do so. The conferences have proven to be very helpful and provide excellent training for new chapter leaders. It is important that incoming leaders attend. The Society contributes to the expenses, so chapters should be able to have at least one person attend.

This conference is traditionally held at Society headquarters in Brookfield, Wisconsin. This is a great way for new chapter leaders to see the Society and get a better understanding on how the Society, CEBS and the International Foundation of Employee Benefit Plans fit together.

Virtual Assistant

The virtual assistant position at the Society can support your chapter with its website, social media and the execution of virtual programming. Updates to your website and/or social media can be made upon request. The virtual assistant creates an event page for your upcoming events and sets up the appropriate registration form. For virtual events, contact the Society to see how they can help.



Reporting

When to Report	What to Report
At Incorporation	Official Chapter Bylaws/Articles of Incorporation
Upon Receipt	Employer Identification Number
By January 1	Roster of Chapter Officers
By September 1	Annual Authorization for Inclusion in Group Tax Exemption
By September 1	Notification of No Change in Chapter Status
By September 1	Form 990 (when chapter's gross receipts are over \$25,000)
By October 15	Dues Billing Notification
After Meeting	Minutes of the Board of Directors
Prior or After Meeting	Educational Programs
For Approval	Amendments to Bylaws

Official Chapter Bylaws/Articles of Incorporation

After incorporation is received, the original copy of the final articles of incorporation and bylaws must be filed with the Society. The official notification and date of incorporation must accompany these documents.

Roster of Chapter Officers

Submit this list to the International Society as soon as officers and board members and committee chairs are elected and chairs are appointed.

Minutes of the Board of Directors

A copy of the minutes from all Board of Directors meetings must be filed with the International Society.

Educational Programs

According to the bylaws, chapters are required to hold a minimum of three educational programs of value to graduates each year. A copy of each educational program announcement or other written notification must be submitted to the International Society.

Annual Authorization for Inclusion in Group Tax Exemption

The International Society has secured a 501(c)(3) group tax exemption for its U.S. chapters. The group exemption has eliminated the need for each individual chapter to file its own tax exemption application with the IRS.

In order to maintain a group exemption, the Society is required to file an annual report. Information for the annual group exemption filing will be sent to the U.S. chapter presidents by **July 15**. The following items must be forwarded to Society headquarters no later than **September 1** of each year:

- 1 Annual Authorization for Inclusion in Group Tax Exemption**
- 2 Notification of No Change in Chapter Status:** Certification that the chapter has made no changes in the **mandatory** provisions of the chapter bylaws and that the chapter is not a private foundation as defined in Section 509(a) of the Code
- 3 Form 990 (when chapter's gross receipts are over \$25,000):** If the chapter has gross receipts exceeding \$50,000, it is the chapter treasurer's responsibility to file it.

A detailed explanation of group exemption procedures as issued by the IRS is available from the Society. The Society is available to help with filing.

Guidelines, General Policies and Bylaws

Following are the policies that govern the operation of the International Society as a nonprofit educational association organized in the United States under the provisions of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. These policies and procedures must be followed by the U.S. local chapters of the Society so as not to jeopardize the tax-exempt status of the International Society or the group tax exemption of its affiliated chapters. Failure to comply with these policies will result in the loss of chapter affiliation with the International Society. The general policies apply to the Canadian chapters also.

Membership

ISCEBS, located at the International Foundation of Employee Benefit Plans, is a nonprofit organization open to those who have earned the CEBS, GBA or RPA designations or are active CEBS students.

Each chapter may have two classes of members: voting members who must be CEBS graduates and are current members of the International Society, and GBA, RPA, designees or CEBS students. However, this does not prohibit chapters from inviting nonmembers to attend educational meetings.

The Society encourages CEBS student involvement in chapter activities. The chapter may have student affiliates who may attend meetings at reduced rates but may not vote or hold elected office. In order for a student to be eligible to join a local chapter, they must be considered a **current** student according to the International Foundation. To be a current student, they must be registered in the CEBS program within the last two years. If they registered over two years ago, they must have shown some "activity" within the last two years to be considered current. By "activity" we mean things like ordered books or registered for an exam. Being eligible to be a student affiliate has nothing to do with how many exams someone has passed. If they have taken an exam within the last two years and failed, they are still considered a current student. Those who hold the RPA or GBA designations or have passed a CEBS exam may join the Society as nonvoting participants and are considered students at the local level.



Educational Meetings

In accordance with the mandatory provision of the local chapter bylaws, local chapters are required to hold at least three meetings each year of educational value to graduate members.

Dues

The Board of Directors of each respective chapter determines chapter dues. Graduate and student members' local dues will be billed and collected through the annual dues billing of the Interna-

tional Society commencing with the first full year of operation of the chapter. Dues collected by the International Society shall be remitted to the chapter in a timely manner. Invoices are sent to all current students in a chapter area in the fall.

Fiscal Year

The fiscal year of each chapter shall end on **December 31** unless the Board of Directors of the Society shall approve another date.

Annual Budget

Chapter monies may not be expended unless authorized through approval of an annual budget or by a vote of the Board of Directors of the chapter. In addition, the Board of Directors cannot approve of any expenditure that results in the personal gain of an officer or board member. Board members, officers or committee persons will be reimbursed for any necessary, reasonable expenses of performing their duties with the prior approval of the board.

Election Procedures/Board of Directors

Each chapter shall have the right to determine election procedures for its Board of Directors as long as such procedure is in harmony with the purposes as set forth in the chapter's articles of incorporation and bylaws. Officers of the chapter shall not succeed themselves in the same office. The president of the chapter shall not be eligible for reelection as an officer of the chapter for a term commencing less than one year after the expiration of their term as chapter president. Board members at large will serve a term of three (3) years except the first year of the chapter's existence and where they are filling an unexpired term. Any person who has been elected a member of the Board of Directors shall not be eligible for reelection as a board member for a term commencing less than one year after the expiration of their term as elected member of the board, except when the election of such member was made to fill a term of one year or less, in which case such member shall be immediately eligible for reelection.

Right to Vote

Chapters, as such, shall have no right to vote in affairs of the International Society nor shall a chapter as an entity pay dues to the Society.

Guidelines, General Policies and Bylaws (continued)

Articles of Incorporation/Bylaws Changes

Mandatory Provisions

Chapters must include in their bylaws all of the mandatory provisions as designated in the model chapter bylaws.

Changes

No change in the articles of incorporation and bylaws of the chapter shall be effective until approved by the Board of Directors of the International Society.

Amendment

The articles of incorporation and bylaws of the chapter may be amended in the following manner:

- 1 A proposed amendment to the bylaws of the local chapter must receive the approval of two-thirds of the membership of the Board of Directors of the chapter.
- 2 The proposed amendment then must be submitted to the Society for conditional approval.
- 3 Upon such approval, a copy of the proposed amendment shall be distributed to the chapter membership with notice of the date and manner of voting on such amendment.
- 4 The proposed amendment shall be deemed approved by the membership only in the event at least two-thirds of the total number of votes cast shall be in the affirmative.
- 5 The approved amendment is then resubmitted to the Society and will become effective upon written approval from the Society.
- 6 Suspension/Revocation

The Board of Directors of the International Society shall have the right to suspend or revoke local chapter affiliation for due cause upon the affirmative vote of two-thirds of the board's members. Due cause shall include but not be limited to a failure to conform to the articles of incorporation and bylaws of the Society or the chapter or a failure to meet minimum standards established by the Society. Such action may be taken only after reasonable notice has been given to the chapter with an opportunity for corrective action. If corrective action is not taken by the chapter concerned, the board will provide a fair and proper hearing. A chapter whose affiliation has been revoked shall no longer have the right to use the name or logo of the Society.

Annual Meeting of the Membership

An annual meeting of the membership is required of all local chapters. The president or the Board of Directors calls the annual meeting with due notice to each chapter member prior to the date of the meeting. Meetings should be conducted in an efficient manner using Robert's Rules of Order.

A sample agenda for an annual meeting follows:

1. Call to order
2. Reading of the minutes
3. President's report including a summary of the business transacted by the Board of Directors since the last annual meeting
4. Report of the secretary/treasurer
5. Ratification of the acts of the Board of Directors
6. Reports of the standing and special committees
7. New business
8. Election of new officers and directors
9. Presentation of resolutions
10. Adjournment.



Prohibited Activities

Activities of the chapter and chapter officers and other board members, acting as such, which are prohibited by the International Society's bylaws because of our status as a 501(c)(3) organization include:

- Conducting any sort of job placement
- Participating in any political activity directly or indirectly
- Attempting to influence legislation
- Contributing, supporting or assisting any political party or candidate

In addition, the International Society prohibits its members from the following:

- Expressing opinions that might be construed as an official position of the International Society or local chapter
- Using the International Society or local chapter for personal, tangible (monetary) gain.



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