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1. INTRODUCTION - USE THIS MANUAL FIRST

This Manual is designed to help Section Volunteer Leaders understand and operate the best ISA Section possible for the benefit of your members. This document could never be considered complete due to constant change being encountered by our members, but we hope you find it a very useful resource. We have tried to give you answers to the most relevant questions and we have organized the manual in a structure which will help you plan your Section activities and improve your communications within your Section and across ISA.

Nothing is perfect, so if you see an error or if you have suggestions, please contact ISA Staff. We will be grateful to review your suggestion for inclusion in the ongoing update of this manual. This will be stored online with live links to other parts of ISA, so if links are not working or you find that parts of the manual are out-of-date please let us know.

The many volunteer leaders that have contributed to this manual would all agree that this manual will answer many of the questions you have, but not all. Please contact your District Vice President and/or ISA Staff, both are two very good sources of information on any questions which has not been included in this manual. Most importantly, please use this manual first.

2. THE SECTIONS ROLE WITHIN ISA

The two most frequently cited benefits of ISA membership relate directly to the Sections. These benefits are information/education, and networking. Having a good experience through Section membership is a critical factor when members decide whether they want to continue their membership in ISA.

The Section's Relationship to ISA

All Sections (a group of thirty or more members, whether Regular, Senior, Fellow, or Life Members in a defined geographical area,) are chartered by ISA's Geographic Assembly. Sections are autonomous separately incorporated entities and operate under their own bylaws and constitution if they don’t contradict the Society bylaws. They are represented in ISA (the Society) by their District Vice President (a member of the Society's Geographic Assembly) and by Section Delegates who represent the Section at the annual Council of Society Delegates meeting.

It is important that Section leaders understand both the legal and operational relationships between the Section and the Society. Sections, while affiliated with ISA, do not represent the Society on policy and other issues. Leaders should carefully read the parts of their constitution / bylaws that explain the relationship between the Section and the Society.

Sections and the Society are partners in providing a positive ISA "experience" to members, and a positive ISA "image" to various groups. By keeping in constant communication (via the Geographic Assembly and the ISA staff) this partnership can work to the benefit of all ISA supporters.

Refer to the following items for more information about ISA's structure:
The Section’s Relationship to the District

Sections are part of larger geographic area called Districts. The District structure allows the Society to communicate with the Sections more efficiently and gives the Section a more direct-line of input to the Society (through the Geographic Assembly).

The Section’s Relationship to Divisions

Divisions are the special interest groups within ISA. There are 16 Divisions -- nine in the Industries and Sciences Department and seven in the Automation and Technology Department.

Sections should appoint a Section-Division Liaison Chair to interact with the Divisions, as every ISA dues paying member is eligible for two technical division memberships. This will allow the Section easier access for Division programming resources.

The Section’s Relationship to ISA Departments

ISA Departments exist to carry out the goals and objectives of the Society and to develop programs and services. Departments include: Professional Development; Publications; Image and Membership; Standards & Practices; Industries & Sciences; Automation & Technology; and Strategic Planning. Sections and Departments have no formal relationship, but many Section members do choose to participate in Department activities.

The Section’s Role Outside of ISA

The Section is ISA’s "representative" to many individuals, organizations, institutions, and other groups apart from ISA. These groups include: non-member automation professionals; media entities, both public and technical; other scientific and professional societies; companies, and the public. Since the "image" of the Society often depends upon the image of the local Section, ISA provides resources to assist Sections in creating the best possible image. These resources include:

- Section Operations Resource Manual
- Leadership training opportunities
- Section-oriented newsletters
- Professional staff at ISA Headquarters
- Section, Division, District Graphic Standards Guide
3. ORGANIZING FOR SUCCESS

ISA Requirements and Reports

Sections are autonomous. Sections are asked to provide Headquarters an updated listing of Section officers and chairs annually (depending on the Section’s operating year, deadline 15 December or 15 June) and to send a completed Quarterly Report Form to the District Vice President.

Financing the Section

Financial management is one of the most challenging and critical aspects of Section management. The Treasurer’s Guide outlines the Treasurer’s responsibilities. The Finance section of this Manual covers the details of establishing a Section budget.

There are three main areas of Section financing:

1. Legal requirements and restrictions
2. Dues income
3. Non-dues income

1. Legal Requirements and Restrictions

ISA Sections should incorporate in their home state (Note: International Sections should investigate the appropriate status for their respective countries and consult with their District Vice President.) Incorporation shields individual members from financial liability for the debts of the Section. (Several types of insurance are available to limit the liability of individual members.) It can also help protect members from claims relating to actions taken by others on behalf of the Section.

ISA Sections (in the U.S.) should, when incorporating, file for a tax exemption under section 501 (c)(3) of the IRS code. This status identifies the Section as an educational organization. Under most circumstances the Section will not be required to pay tax on income generated while undertaking the normal activities-of-the Section. Please note that this does NOT exempt the Section from paying sales tax, unless it has received a special exemption specifically for that purpose.

There are certain restrictions placed upon not-for-profit organizations in terms of what they may do and how they may raise money. Sections should carefully review these restrictions as imposed by the laws of the various states or countries in which they operate. Reference the ISA Policies and Operational Guidelines (POG) for more information.

2. Dues Income

One of the sources of income for all Sections is the membership dues rebates. Sections receive a portion of each member’s dues ---- 15% of regular member dues and 30% of student dues.
Sections can request rebates to be directly deposited to their bank accounts. Sections that have difficulties receiving money from the United States should coordinate with staff to find alternative options, such as retaining the first year’s dues for the Section. These options are created on a case by case basis.

3. **Non-dues Income**

More and more Sections are turning to non-dues sources of income to finance their operations. These non-dues sources could include:

a. **Section Sponsored Training**

By bringing a Section—sponsored ISA training event to your area, you can provide a valuable opportunity to current and prospective members to expand their technical knowledge, while earning revenue for your Section. Your Section can earn 10-20% of the gross registration fees collected by ISA headquarters from a successful Section—sponsored training event. The greater number of registrants, the more revenue you’ll gain.

b. **Local Section Directories**

Local Section Directories are a way to provide a resource to Section members, and create a source of income. The directory usually consists of a list of suppliers, products, and resources available to automation professionals in the area. Sections sell advertising to pay for the directory and generate income for the Section. Examples of advertising include anything from adding a company logo to the directory entry to full page advertising.

c. **Trade / Table Top Shows**

Many Sections organize this kind of events as an opportunity to show products and services to their members, it has become a very good networking opportunity, as well as a business opportunity for providers to meet their customers. These shows used to be open to the public. Sections sell exhibition spaces at the show. Some business models include the agreement with companies dedicated to organizing shows, which are used to having dedicated venues and logistics to organize the shows.

d. **Social Events (e.g. golf tournaments, dinners, barbecues)**

**Building A Leadership Team**

A. **Structure**

Efficient management of the Section depends upon a team of volunteer leaders. The team should be structured to allow for input, decision-making, and delegation.

A strong group of active, involved members and a full complement of committees is the ideal situation. Sections with smaller memberships might not have sufficient volunteers to have a committee for every program area, and might have to combine some responsibilities.
The Society MOP SEC 2.3 specifies that the minimum Section officer requirements are a President and Treasurer. A core list of section officers should also include:

- President
- Treasurer
- Secretary
- Society Delegate
- Membership Chair
- Program Chair

Other positions to consider would be:

- Honors & Awards Chair
- Section-Division Liaison
- Education Chair
- Marketing Chair
- Newsletter Editor
- Standards & Practices Chair
- Historian
- Student Section Liaison
- Exhibit Chair
- Webmaster

The above-mentioned positions are linked to the online chair guides.

The balance of Section Board is considered a very important aspect; different points of view allow the Sections to be able to answer the needs of their members. It is recommended to consider the participation on the Board of members from: end-users; education institutions; manufacturers and integrators; and engineering and consulting companies. Besides, it is strongly suggested to consider the gender equity.

The officers and committee chairs (as well as the Immediate Past President) make up the Executive Board / Committee as defined in the Section Bylaws / Constitution. This group acts as the policy-making body of the Section, and has the ultimate responsibility for overseeing the Section’s operations. The Executive Committee should also serve as a vehicle for input from the membership, and should be representative of the membership make-up.

B. Identifying Good Leaders

The "recruitment" of volunteers is one of the most difficult and important parts of leadership. If the Section fails to continue to generate new leaders for the Section, and simply keeps recycling leaders, people will burn out and eventually there will be a large void in leadership. The entire Section cannot survive in the long-term with the same leaders for multiple years. Here are some suggestions for ways to go about filling key leadership roles:
Step 1 - **Start early**

Finding future volunteer leaders can be one of the most rewarding parts of being a Section leader. Discovering if people are the right fit for the team, and then recruiting them for the position can be a long lead time process. Make sure to start as early as possible to discover opportunities to find roles for people interested in becoming leaders in the Section.

Step 2 - **Just ask**

There are plenty of ambitious people in your Section interested in becoming leaders. They will not come to you and ask, “how do I become a leader.” They will be engaged, and interested in talking to you, and are usually very engaged in Section events. People do not know the barriers to entry to becoming a leader in the Section. The Section president needs to empower people to become a Section leader. They do this in a very simple way, they ask them to be a leader. As a Section president, asking people to be a leader carries a lot of weight.

Step 3 - **Recruit the Right Way**

Once you’ve identified the people you want to have as leaders, it is important that the actual recruiting be done correctly. Be clear and accurate with the volunteer about the importance of the job and the time commitment needed to do the job effectively.

C. **Officers and Executive Board / Committee**

The top leaders in the Section are the officers and members of the Executive Board / Committee. These members collectively are responsible for the Section’s success. Their overall responsibilities as a group include:

- legal (corporate)
- fiscal
- member communications
- liaison with related ISA committees and staff
- program oversight
- relationships with other (non-ISA) organizations

D. **Committee Chairs - The Role of Committees**

The committees’ roles in a successful Section cannot be overstated.

Committees:

- Provide a way for members to become involved in Section activities
- Allow the leaders to delegate and spread the workload
- Assure that there is input from a cross-section of the membership
- Combine the experience and expertise of all of the committee members to reach a better decision for the good of the Section.

E. **Committee Members**
Once the Committee Chairs have been recruited, these Chairs should begin recruiting their committee members.

Some sources of committee members are:

- Members who have served on committees previously
- Members who have responded to surveys asking for their area of interest
- Newer members, who have not been involved in Section leadership before
- Members who have experience in the area covered by the committee

Inform the potential committee members what time commitments are required, what the committee is trying to accomplish and what responsibilities they will have as committee members.

**Leadership Orientation**

After all the key leaders have been recruited, the Section should hold a leadership orientation session. This orientation has several benefits:

- it allows all the leaders to meet the new people
- it is a chance to discuss responsibilities for the next year
- it is an opportunity to clear up misunderstandings and misconceptions
- everyone gets the same information at the same time in the same manner
- relationships, as well as goals and assignments, can be discussed
- people get to see that there is a TEAM working
- new leaders get to see that other busy, dedicated, and interested professionals have made a commitment to the Section

The elements of a good leadership orientation are:

1. Opening and Welcome
2. Review of Section History and Recent Accomplishments
3. Review of ISA and Section Structure
4. Discussion of Leadership Responsibilities (general)
5. Discussion of Section Leaders' Legal and Financial Responsibilities
6. Review of Section's Long-Range Plan (if one exists)
7. Review/discussion of Pertinent Parts of Section Bylaws and Policies
8. Explanation of Leadership Relationships (reporting, authority, etc.)
9. Overview of Responsibilities of Various Committees
10. Distribution of Job Descriptions and Related Resource Materials
11. Discussion of Section Goals and Priorities (general and specific)
12. Questions and Answers

The Section President should be sure to assign someone to do an individual orientation for any leader who is unable to attend the group orientation.

**Leadership Training**

It's important that Section leaders understand the difference between leadership training and leadership orientation. Training should include help in skills needed by all leaders (team
building, communications, etc.) as well as specific job training (membership recruitment, bookkeeping, etc.).

Sources of Leadership Training

Here are some sources of training activities and materials:

ISA Leaders Meetings

ISA Leaders Meetings engage a cross-section of volunteer leaders during two to four days of focused work sessions.

Leadership Videos

A series of motivational videos have been developed to encourage members to become Society leaders. The benefits of assuming an ISA leadership role are outlined.

District Leadership Conference

Every District offers a District Leadership Conference (DLC.) This is a one to two-day workshop to offer both training of how Sections, Districts and the Society operates, and to meet other Sections to discuss what works and what doesn’t work with other Sections within the District. Each District identifies and addresses issues of importance to their area.

Geographic Assembly (Board of District Vice Presidents)

One of the first places to look for training assistance is to the Geographic Assembly. These members have been through many of the leadership positions in ISA and are ready to share these experiences with current Section leaders.

ISA Staff

If Section leaders are uncertain of what resources are available, or where to go for training, they should contact ISA Headquarters. An ISA staff member is assigned to act as a liaison and to provide support. A list of staff members can be found on the ISA website.

Outside of ISA

Sections do have some "external" training opportunities available for their leaders. These options include:

- Local Schools/Universities
  
  For training in some of the more general skills areas, like communications and presentations, Sections might look to their local colleges. Many educational institutions around the world offer programs related to the automation industries. Please visit the ISA website for more details on Advanced Degree Programs in automation and control.

- Member Employer Companies
  
  Before looking outside the Section, check with the companies employing ISA members. Most of these companies do training in areas that relate to Section activities -- marketing, sales, communications, etc. Section leaders should investigate whether any of these employers would make some of this
training available to volunteer leaders. To find out where these resources are available, start by polling the Board.

- **Professional Services & Speakers**
  
  If the Section has the funds (or can get a sponsor to underwrite the costs) there are professionals in most Section areas who can provide leadership training for a fee. If you are interested, contact ISA Training Staff.

**Planning and Goal-Setting**

To be truly successful, the Section needs to have a clear idea of exactly what success looks like. The next chapter, Section Planning, outlines the steps to put together an effective long-range plan. When setting specific goals for the Section's committees and leadership, it's crucial that this plan be used to guide the goal-setting process. If the Section plan is used as a true management tool, then goal setting becomes a way to focus Section activities and to measure achievement.

4. **SECTION PLANNING: ITS IMPORTANCE**

Most ISA members are familiar with some sort of planning. It may be called business planning, strategic planning, or long-range planning. Regardless of the name given to it, the planning process is a valuable tool. The planning process will:

- Help the Section focus on specific goals and objectives, to ensure that there is an orderly transition of leadership and consistent programming
- Create another way for members to become involved in Section activities
- Force leaders to make an in-depth analysis of the Section’s programs and services
- Assist in recruitment efforts
- Reflect the sound management practices used by many of the Section members’ own employers
- Reflect the Society’s Strategic Goals

One question often asked is "How long into the future should you plan for?" Here, we are looking at one year, perhaps two, depending on Section leaders’ terms.

**Step-By-Step Approach to Section Planning**

**A. Gathering Information**

Before beginning the actual planning for the Section, you need to get as much information together as possible. This information should be in the following areas:

1. **Historical Information**

   Gather as much information about your Section as possible. What has your membership growth been? Has the mix of your membership changed? How has attendance at Section meetings been growing (or declining)? What programs/speakers/topics have attracted the highest numbers?

2. **Environmental Information**
What is the general economic situation in your Section's area, and what is predicted over the next 1-2 years? What is the status of major employers (are they hiring or cutting back)? What organizations are competitors for your Section, in terms of membership and resources?

3. Member Needs Information

This is the most critical information to gather. It makes no sense to put together a plan that supports programs and services no one wants. Each Section is unique, and the plan you establish should match the makeup of your membership.

4. Society Information

It is very important to consider the Strategic Plan of the Society including their goals, specific objectives for each goal, and indicators. It is expected that many activities within the Section Planning will be aligned with goals and objectives of the Strategic Plan of the Society, and it could be very useful to know as much as possible the Strategic Plan of the Society. Understanding the Society's plan will allow the Section to take advantage of material and tools already developed as part of the Society planning process. It is likely and okay that some Section planning activities will not be included in the Society Plan as each Section has different environments in which they operate. If you have questions about the Society Strategic Plan, the Section leaders can contact the Strategic Planning Department Vice President in order to clarify any doubt or request updated information about the Strategic Plan.

Some methods for gathering information on member needs include:

1. Written Surveys - This is traditionally the way most organizations gather member information. The difficult part is getting enough responses to validate the information.

2. Focus Groups - This technique is used to gather qualitative, rather than quantitative information. By sitting down with small groups of members, the Section can identify general areas of concern. Please remember that information gathered through focus groups cannot be "projected" for statistical purposes.

3. Telephone Surveys - This may be the most effective way to gather statistically-valid information quickly. By using a short, specific survey and getting answers over the phone, Sections can gather a representative cross-section of opinions in a fairly short period of time.

4. Online Surveys - Today online surveys are widely used by many organizations, even the Society collects data using the method. This is an effective way to gather statistically-valid information quickly. There are many service providers available, including some that are free.
B. **Designating a Planning Team**

The Section needs to determine who will put the plan together. In many cases, this will be some sort of pre-determined leadership group -- a Board, or Planning Committee. It is important to be sure that it is representative of the membership of the Section. All the Sections demographic groups should have some input (either through membership on the planning team or through their input on surveys and focus groups). If a segment of the membership feels that their viewpoint has not been included in the plan, they are unlikely to support the final plan itself.

The number of people on the planning team should be kept to a workable size (no more than 10 people, no fewer than 6).

C. **Analyzing the Information**

To help determine the areas of concentration you will analyze the information using the Strength, Weakness, Opportunity, Threat (SWOT) technique. All of the data will be examined to determine if it is a Section Strength, Weakness, Opportunity or Threat. Using this technique will help you determine areas in which the Section should focus its efforts.

D. **The Section's Mission**

Although some organizations believe the Mission Statement needs to be some all-encompassing, idealistic statement, that's not necessarily the case. Since ISA has spent so much time establishing its Mission Statement, the mission of the Sections becomes one that is easy to identify and communicate. All ISA Sections should strive to accomplish this suggested universal Section mission:

"The Mission of the Section is to serve its members by supporting the goals and objectives of ISA through effective programs and services."

E. **Identifying General Goals**

The next step is to identify specific goals that help the Section accomplish its Mission. A goal is a timeless, unbounded statement that describes the condition or attribute we seek to attain. Goals should reflect the fact that the Section is answering the needs of the members as established in the information-gathering process. An example of how a goal is stated:

The Section will strive to accomplish its Mission through effective programming in the following areas:

1. Continuing education
2. Effective Section meetings
3. Member communications
4. Public relations
5. Membership development
6. Competent Section management

For each of the areas identified, there then needs to be a statement of exactly what the goals of that area are.
Some examples include:

- **Area of Concentration: Continuing Education**
  
  **Goal:** To provide high-quality, reasonably-priced continuing education programs that meet the needs of the Section’s membership.

- **Area of Concentration: Effective Section Meetings**
  
  **Goal:** To attract the highest possible number of members to Section meetings by offering high quality, useful, and enjoyable programs.

- **Area of Concentration: Membership Development**
  
  Goal: To attract, and keep, the highest possible number of members year over year.

**F. Establishing Measurement Criteria and Goals**

Once these goals are established, the Section must determine measurement criteria. If the criteria are established properly, then meeting those criteria will accomplish the objectives -- and the Mission of the Section. Goals need to be SMART (Specific, Measurable, Achievable, Realistic & Timely). Here are some samples of how measurement criteria can be established for some goals:

- **Area of Concentration: Membership Development**
  
  **Goal:** To attract and keep the highest possible number of members over the next two years.

  Measurement Criteria: (in order of importance)
  
  1. Annual retention rate of 90%
  2. Number of new members
  3. Net growth vs. other Sections of same size
  4. Market Penetration (25% of members vs. number eligible to join)

- **Area of Concentration: Effective Section Meetings**
  
  **Goal:** To attract the highest possible number of members to Section meetings by offering high quality, useful, and enjoyable programs.

  Measurement Criteria: (in order of importance)
  
  1. Total meeting attendance (annually)
  2. Attendee evaluation scores of greater than 80% approval
  3. Attendee mix (control professionals vs. suppliers)
  4. Repeat attendees
  5. Number of attendees per firm
Once the measurement criteria are established, Sections can determine the status and set objectives for the future. For example:

Measurement Criteria: Total Meeting Attendance (annually)

Current measurement (Year 1): 874

Objective:

Year 2 - 10% increase over Year 1 (961)
Year 3 - 5% increase over Year 2 (1,009)

Measurement Criteria: Attendee Evaluation Scores

Current measurement (Year 1): 7.5 average (out of 10)

Objective:

Year 2 - 8.0
Year 3 - 9.0

Measurement Criteria: Attendee mix

Current measurement (Year 1): 55% measurement control professionals, 45% suppliers

Objective:

Year 2 - 60% - 40%
Year 3 - 70% -30%

G. Suggested Implementation Steps - Strategies

Once the measurement criteria are established, then strategies are developed for each objective. It's important to note that any number of ideas will come up to accomplish each objective. The planning team needs to put these suggestions in some type of priority order, since it is unlikely the Section will have the financial and/or manpower resources to implement every idea.

Here are some examples of strategies:

Measurement criteria: Attendance at Section Meetings

Current measurement: 874

Objective: Year 2

Suggested strategies: (in priority order)

1. Develop a carpool system
2. Begin having door prizes and incentives
3. Reduced meeting fees when attending more than 4 meetings per year
4. Move meetings to other locations
5. Targeted phone calls to least active members each month
6. Earlier mailing of meeting notices

H. Timetables and Responsibilities

After the areas of concentration, the goals, the measurement criteria, the objectives, and strategies have been established, it is time to set timetables. It is normally best to give the person or committee assigned to carry out the strategies some flexibility and "ownership" within the process. Many groups will present the implementation part of the plan to a specific committee and ask that the committee return its suggested timetable to the planning team by a certain date. This assures input from the committee and retains control of the process and focus of the plan.

Here is an example of how an implementation plan might look:

Measurement criteria: Attendance at Section Meetings

Objective: Year 2

Strategy: Develop Carpoools

Assigned to: Program Committee

Timetable:

1. Identify areas of need and report to Board by February 1
2. Determine core group of current attendees to ask to drive by February 15
3. Mail/phone potential drivers to determine interest by March 1
4. Assign non-active members in areas to be contacted by drivers by March 15
5. Begin program by April meeting

I. Stating Assumptions

Part of the actual written plan should include a statement of "assumptions" that the planning team has made when developing the plan. These assumptions reflect what the planning team believes the "environment" will be for Section activities over the next few years. The assumptions here should reflect some of the information gathered at the beginning of the planning process. Adding these assumptions to the planning document alleviates some concern from members that the planning team did (or did not) take certain things into consideration when developing the plan. A sample of some of these assumptions might include:

- Employers in the Section area will continue downsizing, reducing the number of potential members and dollars for ISA support
- General economic conditions will improve slightly
• More and more members will want information available electronically
• Time constraints on members will continue to increase their demand for worthwhile meetings and programs

1. **Monitoring Progress and Making Adjustments**

Very few plans will end up being carried out exactly as they are written. This is one reason why stating assumptions is important. As things change, the planning team needs to revisit the plan to be sure it is still a practical tool, given these changes.

Sections should set specific times to review the plan and monitor its implementation progress. Quarterly review is recommended.

5. **SECTION CONTINUITY**

As important as it is to lead the Section effectively, it is nearly as important that some thought be given to how leaders can assure the *continued* prosperity of the Section. To avoid “leader burnout,” and to assure a flow of new leaders and new ideas, Sections should implement some basic techniques of continuity and succession. Here are some suggestions:

**Appoint Vice Chairs or Assistant Chairs of Committees**

Appoint a Vice Chair or Assistant for each of the Section’s committees. The Vice/Assistant Chair would be able to step in if the Chair is unable to handle all the work of the group. At the Section’s choice the Vice/Assistant Chair could move into the Chair’s job at the end of their term. This provides the new Chair with 1-2 years of experience on the committee, and he/she will be ready to keep projects moving without a long learning period.

**Use Term Limits**

Allowing leaders to serve in the same role for an extended period is a somewhat dangerous precedent to set. It does not encourage new people to become involved, and it also can inhibit creativity. Sections need to encourage new people to become involved at all levels. Limiting the length of time, a person can serve in any one leadership position ensures the infusion of new people, new ideas, and new energy.

**Have a REAL Section Plan!**

One of the advantages of a Section strategic or long-range plan is an orderly transition. If the Section plan is truly being used as a management tool, it will avoid the "starting all over again every year" problem. It will allow the leaders to channel their energies into programs that have been determined to be of importance to the Section’s future.

**Keep Section Archives**

Many Sections keep historical records, such as minutes. Sections are also encouraged to keep copies of newsletters, other important communications, and notes/programs from their most successful meetings and educational offerings. This archive becomes a resource not only for the administration of the Section, but for programming as well. It allows
leaders to avoid repeating mistakes. Other examples of archived records may include:
Planning documents, past Leader Forms, past events/programs, and publications other than newsletters, submittals to ISA Headquarters and DVP such as annual business plan, quarterly reports.

**Find a Place for Everyone to Get Involved**
The Section structure needs to provide as many "involvement" opportunities as possible. For each big volunteer job, the Section leaders should try to break the jobs down into smaller, more manageable tasks. Once members have had a positive involvement experience, they are more likely to move on to larger roles.

**Employ continuity mechanisms used by the Society**
Sections can use the same succession mechanisms that have worked for the Society, specifically the President-elect, President, Past-President model. It has been demonstrated that it is very effectively to allow the new leaders - specifically the Section President elect - to have a formation period working with the President, this period will allow them to work together defining mid-term activities. In addition, maintaining the Section Past President actively working with the President and the President elect allow them to seek advice from past perspectives of the Section, and to do certain tasks in a efficient way, due to the networking already acquired during his / her term as President elect and President.

**Contact District Leaders and ISA Headquarters**
ISA's District leadership can help suggest ways to interest new members in leadership positions, and can put you in touch with other Sections who have faced similar problems. ISA's Headquarters Staff can also help make contacts and provide information on what other Sections do to ensure the continuity of their Section.

6. **DISTRICT AND SOCIETY MEETINGS**
Sections that support the attendance of their elected officers at District and Society meetings are making a concrete investment in the Section's future. These meetings provide excellent training into the how’s and why’s of the Society.

**District Leadership Conference (DLC)**
The District Leadership Conference is an annual meeting for informing and training incumbent and incoming Section officers

**Society Meetings**
Twice a year, the Society President invites all elected and appointed leaders of the Society to come together for two to four days of concentrated meetings at the Strategic Leaders Meeting (SLM), formerly known as Spring Leaders Meeting and the Annual Leadership Conference (ALC), formerly known as Fall Leaders Meeting. The basic purpose of these meetings is to plan the Society's direction and to adopt guiding policies. In addition to providing a forum to conduct Society business, the meetings also provide an opportunity for new ISA leaders to be introduced to Society structure, operations, and activities.
Several special sessions identified as 'Leader Training' are held at the Annual Leadership Conference. These sessions address the needs of Section officers and provide basic information about the various aspects of Society Operations.

**Annual Meeting of Council of Society Delegates**

Each Section in ISA designates a member to act as its Society Delegate. The Council of Society Delegates meets during the Annual Leadership Conference (ALC) of the Society. The purpose of the Council of Society Delegate meeting is to receive the report of the Society Committee and to conduct elections; receive and review the Annual Reports of the President, President-elect Secretary and Treasurer; and to act or advise on general policies for the Society and when required revise the Society's bylaws.

7. **SECTION MEETINGS**

The Section meeting is the most important activity in the Section. How often the Section meets is up to the Section leadership, though to continue being an 'Active Section' the requirement is a minimum of three (3) member events per year noting that Board meetings do not count as member events. It is important to make the meetings as worthwhile as possible. Section meetings are important because:

- They are the best way for our members to get involved
- They are part of the Section's retention efforts
- They are a way to recognize and orient new members
- They are a chance for members to meet the leaders in the field
- They are a chance to update members on ISA activities
- They are a great recruitment tool for both new members and new Leaders
- They are the most viable form of continuing education
- They provide peer contact and business opportunities
- They can - and should be - FUN!

Leaders need to ensure that the meetings are well-planned and well-executed. Here are some general guidelines for better Section meetings. Some Sections now allow members attend online and other record their meeting then post them up online for Members to view at their convenience.

**The Meeting**

One way to produce good meetings is to break the meeting into several parts and consider each part as a separate function. Assign a different person to each function, thereby distributing the work and avoiding the need for the program chair to have too much to do at each meeting. Specific suggestions for ways to manage each part of the meeting are listed in the Program Chair's Guide. These meeting parts include:

- **A. The Facility**

  It's important that the facility be compatible with the type of meeting. Section leaders should inform the facility manager what the Section needs to hold the best possible meeting, and make certain that the facility can fulfill those needs. That way the facility becomes a "partner" in the success of the meeting. It's also
a good idea to get to the facility well before the meeting to check out all aspects of the meeting site.

B. The Gathering/Registration Period

The need to meet and talk with other measurement and control professionals is partially met through a structured gathering period prior to the official start of the meeting. As part of registration there should also be a way to identify guests and new members, so that leaders can talk to them about joining and/or becoming involved in the Section. Many Sections offer online registration and some Sections use a sign-in sheet with an option to request information on Membership.

C. The Meal Service (Optional)

While it is nearly impossible to meet everyone's needs in the meal area, be sure to offer at least two selections. The Section Program Chair's Guide gives some other options on ways to get the most out of your meal functions. Some Sections offer light refreshments only while others omit the meal service altogether.

D. The Program/Speaker

This is the most important part of the meeting. Be sure to allow adequate time for the speaker. If you must cut any part of your meeting (due to time constraints), don't make it the speaker. A listing of suggested speakers and program topics is included in the Program Chairperson's Guide and the Speakers Directory.

E. Section Business

Section business should be done in a summary format, unless there is some pressing matter that cannot be addressed at a Board or committee meeting.

F. The Closing

There should be some form of official closing to the meeting. This is an opportunity to thank the attendees and guests, to summarize any needed activities or discussions, and to remind attendees of the upcoming Section meetings and functions.

G. Post Meeting Activities

After the meeting, those who are responsible for the meeting should do an evaluation and begin planning to make any necessary changes for the next meeting. Someone should be assigned to be sure that a thank you letter goes out to everyone who helped put on the meeting - speakers, committee members, facility representatives, etc.

Any pertinent information or news from the meeting should be sent to the Section's newsletter editor for inclusion in the next issue.

Increasing Attendance
This is always the hardest part of any Section activity. The BEST way to get members to show up for Section meetings is to have programs that are so good that attendees go out and tell their fellow members what they missed and encourage them to attend the next meeting. The Section leadership can also take some specific steps, including:

- Arranging carpool
- Having someone from the Membership Committee call all new members and invite them to meetings
- Call the LEAST active members and do a special promotion to them
- Customize meeting notices by identifying specific benefits of attending
- Create poster-sized notices or emails that members can display at their company or send to their colleagues
- Utilize the online world with email reminders, notices on LinkedIn, Facebook, etc., and other social media. Have your Section Technical Program on your website and links to booking pages for all your notifications.

Be sure meeting notices are sent far enough in advance to allow members to respond, and, if necessary, adjust their schedules. At the same time, they shouldn't be sent so far in advance that members ignore them. Of course, the meeting notice should be a reminder (a regular schedule of meetings should be sent to all members at the beginning of the year) as well as a promotional piece.

The location of the meeting can make a difference, too. Some Sections believe that having their meetings at the same place each time allows members to become comfortable with their travel, the facility, etc. Other Sections prefer to move their meetings around, so that no one group of members must travel too far each time. Other factors that can have an impact on attendance include: cost of attending (registration fee), day of the week, time of day, and program topic/speaker.

8. SECTION MEMBERSHIP GROWTH

There is no better way to meet the needs of your members than to have a growing, and increasingly active membership base. The following are some reasons why membership growth is important to the Section:

- Benefits the Section's financial base through dues income and program income
- Increase in leadership base (more people to help do the Section's work)
- Testimonial to the Section's value
- Enhances the morale of Section leaders
- Adds to the combined expertise of the Section membership
- Encourages diversity in the membership
- Brings new ideas and viewpoints into the Section
- Increase the Section's influence with key groups
- Earn recognition for the Section through ISA awards programs

With so much dependent upon membership growth, it's important for the Section to have a plan for attracting and keeping members. It also makes sense (both from an administrative
and practical viewpoint) to think of membership recruitment and membership retention as two separate programs.

**Membership Types:**

ISA provides a variety of membership categories:

**ISA Regular Member**

Full dues-paying ISA members enjoy discounts (20% in most cases) on training, publications, and event registration; free, unlimited downloads of technical papers; free online, pre-recorded web seminars on key topics and trends; free online viewing of over 150 ISA standards, recommended practices and technical reports; two free technical division memberships; free subscriptions to *InTech*, the premier magazine for automation professionals, and the *Automation Weekly* e-newsletter; free online access to *ISA Transactions*, which covers the latest advances in measurement and automation; access to tabletop technology exhibits, subject matter experts, networking and leadership opportunities, and local employment opportunities through ISA’s geographic Sections; and much more.

For those members living in reduced-dues countries, as defined by the World Bank, dues will be calculated during the checkout process.

ISA members can achieve numerous prestigious membership grade levels:

**Senior Membership**

An ISA member or applicant who has graduated from a baccalaureate engineering or science curriculum, with at least six years of active work experience in the instrumentation, systems, and automation field (two of which have been in a position of responsible charge) may apply for this membership grade. If not a baccalaureate graduate, the member/applicant must have 10 years of active work experience in the instrumentation, systems, and automation field (two of which have been in a position of responsible charge). All current ISA members meeting these criteria may apply for Senior Member. Non-members must join ISA first and then apply for Senior Member status.

**Life Membership**

The Life Member Grade is ISA’s way of recognizing the many years a member has devoted to the Society. Any member, Senior Member, or Fellow who has been a member of ISA in good standing for a total of at least 25 years and whose combined age and years of ISA membership equals or exceeds the sum of 90 is eligible to apply for Life Member grade. Life Members are exempt from paying dues, yet receive all benefits and privileges of membership. For more information and to apply, visit the [ISA Life Member application page](#).

**Fellow Membership**

The esteemed Fellow member grade is one of the ISA’s highest honors. It can be earned by a Senior Member who is recommended by the Admissions Committee.
and then approved by a majority vote of the Society's Executive Board and who possesses outstanding and acknowledged engineering or scientific attainments; who has been a Senior Member for at least five years; and who has received peer evaluations leading to recommendation for election by the Society Admissions Committee.

Nominations for the Fellow Member grade are accepted from an ISA member. Nominations are made in writing on the appropriate form and accompanied by the designated number of Fellow or Senior member evaluations.

**ISA Student Membership**

An individual who is enrolled as a student in a program leading to an instrumentation, systems, or automation-related degree or certificate may join ISA even though there is no local student or regular Section available. These virtual student members participate in ISA through electronic communications and are entitled to all ISA benefits (with the exception that they receive *InTech* magazine in digital version only and that they are excluded from some age-related, third-party benefit programs and from voting). They are encouraged to become active volunteers and participants through the many resources ISA offers students. Virtual students can join ISA technical divisions for additional networking, educational, and career-building resources.

**ISA Virtual Student Membership**

This Member grade allows students who do not have access to a Regular or Student Section to participate in ISA through electronic communications. This grade enjoys all other benefits of regular student membership.

**ISA Automation Affiliate**

ISA has established agreements with several organizations that are members of the Automation Federation, of which ISA is the founding organization. Members of these organizations (or employees of the organization member companies) can join ISA as Automation Affiliate Members. This membership grade provides an outstanding selection of benefits.

**ISA Automation Community Subscriber**

ISA Automation Community Subscribers enjoy a free, qualified subscription to the digital version of *InTech*, the premier magazine for automation professionals, and a free subscription to Automation Weekly e-newsletter; free online resume listings on ISA Jobs; access to ISA’s mentor program and email forums; and the option to purchase ISA Technical Division memberships for $10 per division.

A membership comparison chart located on the ISA website, gives a side-by-side comparison of ISA’s membership categories and benefits.
Membership Recruitment

The first thing the Section needs to do is to decide who is responsible for recruiting new members. There are two specific groups that should have that responsibility. The first group is the Membership Committee. It is assumed that Membership Committee members will not only put together programs to attract members, but will also actively do some of the recruiting themselves. The second group is the Section Leadership -- officers, committee chairs, and members of the Executive Committee. If a person is in a key leadership role, it is reasonable to expect that they can explain to other automation professionals why they should join ISA. It is important that members taking on a leadership role understand that trying to recruit new members goes with the job.

Important recruitment considerations:

A. Be Organized

The Membership Committee is one of the most important ones in the Section. The Chair of this committee should be carefully selected for his/her abilities in the areas of: organization, marketing/sales, team-building, delegating, goal achievement, and follow-through. This person also needs to be in a position professionally to commit adequate time to this challenge.

The Chair then needs to recruit a committee of adequate numbers, skills, and diversity to accomplish the Section’s membership goals. One option for organizing a Membership Committee is to create a number of subcommittees and assign members to chair or serve on these committees. Some typical subcommittees would include: Retention, Membership Campaigns, Orientation/Welcoming, Employer Support, Involvement, Prospecting, and Membership Records.

B. Be Focused

It is important for all committees to have an established set of goals and objectives. Membership growth is the one area of Section activities where success or failure is visible every day. Membership goals need to be prioritized (number of new members, net growth, etc.) Membership goals also need to be reviewed regularly to assure that they are being approached effectively and that they remain reasonable and achievable as things change in the Section.

Timetables also need to be established for carrying out recruitment activities. The membership campaign is only one part of an ongoing recruitment program. The Committee should have some type of recruitment activity occurring each month.

C. Be Knowledgeable

The membership committee should be sure they are making full use of all the recruitment resources available. ISA Headquarters is constantly developing recruitment tools to assist Sections and individual members, so this should be the first place to go for help. The committee should also hold a training session among its members. This allows the committee to go over the recruitment resources and to be certain that everyone can describe ISA membership benefits
to prospective members. It is also the place to answer any questions about ISA membership eligibility, dues payments, payment options, and other administrative details related to membership. ISA Headquarters has developed a Member Benefits Flyer located on the ISA website in Leader Resources. You can use the flyer as a helpful tool to describe the member benefits, and you can download, or print and hand it out to prospective members. There are also other brochures, flyers, newsletter advertisements, and articles available in the Leader Resources area of the website for this use as well.

D. Be Prepared
The hardest part of membership recruitment for most people is answering objections -- those reasons prospects give for NOT wanting to join ISA. Membership in ISA is an individual decision, and each prospect will have her/his own reasons for joining or not joining. Any member who is going to ask another person to join should be prepared to handle these objections as easily as possible.

E. Be Enthusiastic
If members are going to be successful in getting others to join, they need to approach recruitment with a positive attitude. Any indication that they are nervous or unsure of themselves is certain to be noticed by the prospective members. To keep that positive attitude, members should realize that when they get other automation professionals to join they are not only helping the Section grow, they are also helping the prospect! After all, if one truly believes that ISA membership can benefit someone, both personally and professionally, then ISA membership is a "gift" you can give!

F. Be a "Testimonial"
Being a testimonial for ISA merely means that the best way to convince someone to join is to tell them why you are a member! Many ISA members had the same concerns and misgivings about joining when they were originally approached about ISA, and they made the decision to join. This empathy for the prospect is a powerful tool when trying to convince others to join. Members should tell the prospect how they (the member) have benefited from ISA membership. Be sure to talk about the advantages of being both a Section member as well as an ISA member. Be sure to include the two division memberships they receive free for joining.

G. Be Persistent
Membership recruitment can be one of the most rewarding volunteer jobs in all of ISA. Recruitment can also be discouraging because not everyone you ask will join. Just remember that few people join on your first attempt -- you must stay with it!
Membership Retention

Attracting new members is only part of Section membership development activities. Another equally important aspect is membership retention. Retention is much more than trying to put on good programs and then sending out renewal notices. Sections that develop a planned system of retention have the best chance of retaining their members.

Here are some reasons why membership retention -- as a separate function -- is important.

- A high retention rate is a sign that the Section is meeting member expectations
- The longer members stay in, the more likely they are to participate in Section leadership opportunities
- Focusing extra efforts on retention adds to the “lifetime value” that Sections receive from long-term members
- It costs more, both in time and money, to recruit new members than to get current members to renew
- A high retention rate is a measurement of success, and is a good "testimonial" to show potential members

It is obvious that membership retention is an important part of Section operations. Therefore, it would make sense to attempt to put a retention program into effect as soon as possible. Here is a summary of some specific "steps" a Section can take to increase the chances that members will renew.

Retention Step 1 - Concentrate on New Members

In any organization, the most likely "drops" are the newer members. Statistically, nearly 65% of the members who drop each year are people who joined the previous year. The first few contacts with the Section will make a lasting impression, be sure to welcome the new members the right way. Have someone designated to officially welcome each new member into the Section (this is in addition to the welcome letter they receive from ISA). When a new member attends a Section meeting, be sure to have someone make them comfortable, introduce them to members, and tell them how to get the most out of the meeting.

Retention Step 2 - Reinforce ISA Member Benefits

Sections should have a method of orienting new members. Even though all of ISA's member benefits were explained to the new member during the recruitment process, most people join for one or two main reasons. It's the organization's job to remind them of all the other benefits they get. Each Section should try to follow-up with new members to learn more about their needs, and how they want to participate in ISA. Some Sections have a checklist that they go through (briefly) with each new member, to be sure they're aware of everything the Section is doing.

Retention Step 3 - Get Members Involved in Section Activities

It's an old saying, that involved members don't drop out. The problem is getting them to become involved. Sections shouldn't expect every member to participate at the same level, since members will participate at whatever level is comfortable for them. What should be emphasized is the need to get members involved at SOME level.
**Retention Step 4 - Member Recognition**

The concept of using recognition to aid retention is very simple -- when a member participates in a Section activity, someone should say "thanks." Even though the member does not take a leadership role, he/she does make a commitment of time by participating in meetings, etc., and should be thanked in some way.

**Retention Step 5 - Inviting the Member Back Again**

The final step in the retention process is the actual "invoicing" process. Many Sections believe that when ISA Headquarters sends out the renewal notices that this is the start of the retention process, but it's really the last part. The whole point of having a retention "system" is to raise the chances that the renewal notice comes back with a renewal.

**Roster Reports**

To help with membership retention and recruitment, Sections are encouraged to download a roster report regularly. There are step by step instructions on how to download roster reports available in Leader Resources.

The following Section leaders can access a membership roster from the ISA website: President, President-elect, Vice-President, Secretary, Treasurer, Membership Chair, Newsletter Editor, and Webmaster.

**9. ISA FOUNDATION SCHOLARSHIP AWARDS**

The mission of ISA’s Educational Foundation is to provide, through the award of scholarships and other educational program development, the recognition of, assistance to and encouragement of students with outstanding potential for long-range contribution to the fields of instrumentation, systems, and automation.

The scope of ISA’s Educational Foundation is limited to students studying in the field of instrumentation, systems, and automation. The overall approach of the program is to recognize as many outstanding talents in instrumentation, systems, and automation as possible, early in their careers.

Recipients must be currently enrolled in a 2-year program, 4-year baccalaureate program or its equivalent, or a graduate degree program at an educational institution in their country of residence. Recipients or beneficiaries of the 2-year program awards must have completed at least one academic semester or study (at least 12 semester hours); 4-year baccalaureate award recipients must be students at the sophomore (second) year or higher of their study or its equivalent. All award recipients are studying in the field of instrumentation, systems, or automation and must be enrolled in an educational institution for the full academic year (2 semesters) during the award year.

By recognizing and supporting student and academic excellence in instrumentation, systems, and automation, this program can significantly contribute to the development of talented individuals in the profession and related industries by:

- Supporting individuals studying and/or doing research in instrumentation, systems, and automation
• Attracting more high-talent individuals to the field
• Increasing the visibility of the field in order to broaden the labor pool of individuals qualified to work in the field
• Supporting research and academic endeavors of individuals in organizations that provide education in instrumentation, systems, and automation
• Supporting talented students involved in novel research in instrumentation, systems, and automation

Sections should encourage students to apply for the ISA Education Foundation Scholarship Program.

The scholarship program includes awards from the following categories.

• **Educational Foundation Scholarship** - Recipients of awards are full-time college or university students in either a graduate, undergraduate, or 2 yr. degree program with at least an overall GPA of 2.5 on a 4.0 scale. Students should be enrolled in a program in automation and control or a closely related field.
• **ISA Executive Board Scholarship** - These funds were provided by past and present members of ISA's Executive Board. Preference is given to applicants with demonstrated leadership capabilities. Award amount varies.
• **Named Awards** - Funds are provided by families or groups in honor of specific people.
• **ISA Technical Division Scholarships** - Funds are provided by specific ISA Divisions. Scholarships are given to outstanding students pursuing careers in the area pertinent to the Division's activity.
  - Some Divisions, such as Chemical and Petroleum Industries, Food and Pharmaceutical Industries, the Power Industry Division and the Water and Wastewater Industry Division ask that completed applications be sent to a specific person.
• **ISA Section and District Scholarships** - Funds provided by specific ISA Sections and Districts.

**Amounts Awarded:** Through the ISA Educational Foundation, higher awards are provided to the top two undergraduate students. All other award amounts vary.

To create a Section endowment, the Section would deliver funds to ISA along with a completed agreement. ISA would match the initial contribution as well as any future contributions into the fund in the amount of $25 or greater. Endowment funds are added to the general ISA investment pool and earnings will be added back into the fund at the end of each year (historically around 4%). The Purpose area of the agreement should state how the fund will be administered. The requirements for distributing awards can be determined by the Section or managed by the ISA Educational Foundation Scholarship Committee. ISA does advise to only distribute awards based off the earnings of the fund and not the principal, although the final decision is determined by the fund administrator.

Please contact an ISA staff representative for more details.
10. SECTION REPORTING

Section reporting is a powerful and useful measurement tool for your Section. It provides a quick and easy way to evaluate what is offered to your local members as compared to what is available through ISA. You can use the Section reporting activities as a roadmap to effective programming.

ISA Sections are not required to submit a Section Annual Report. However, it has been demonstrated that their development constitutes a very useful tool for the Section leaders, to understand the goals accomplished, to present the results to the Section members during the Section member meetings, as well as to allow a “smooth” transition between leaders of the Section.

ISA respects the time commitment you have already made as a local Section leader and wants to support your effectiveness through efficiency. The information you can provide is valuable. When joined with information from other Sections, it empowers your leaders to improve opportunities and services to Sections. The following structure for the Section reporting is a guideline, and should be tailored as per each Section local needs:

Section Management

General Section management is important to the success of a Section. It is suggested to include in the Section reporting the following activities:

SM 1 - Annual Planning Meeting

ISA is convinced that Sections can best serve their members by having a well-planned, well-supported plan of action. A guide to holding a Section Meeting is provided in section 7 of this Manual. It is not necessary for the Section to follow the sample planning process provided here - the important thing is to commit to the planning process and have some formal planning meeting function to outline the Section’s plan of action. In addition to the Section Meeting planning, Section leaders should contact their Staff Representative at ISA Headquarters and their District leaders for assistance, ideas, and the names of other Sections which have had success in this area.

SM 2 - Budget and Tax Responsibility

The fulfillment of the Section’s annual budget execution and tax responsibilities is REQUIRED. The Section leaders must be knowledgeable about the Section’s tax responsibilities. The Section Treasurer’s Guide included in section 3 of this Manual gives budget guidelines, sample budgets, other financial statement information, and a list of resources to assist Sections.

SM 3 - Section Organization and Leadership Protection

Even the smallest Sections undertake programs and financial transactions which place their leaders in a position of legal responsibility. ISA strongly encourages Sections, which are separate legal entities from the Society, to incorporate, obtain General Liability Insurance, and purchase Officers and Directors Liability Insurance. This not only protects the Section and its leaders, it also encourages
leadership participation by members who would be reluctant to do so without this protection (due to employer/company policy or personal preference). ISA can provide information on how to incorporate, what coverages to consider and where to get this insurance. The Section Treasurer's Guide in section 3 of this Manual also covers this area.

**SM 4 - Accurate Minutes of All Board Meetings Kept**

This seems like a common-sense activity, but it is included here because it is so critical to the Section's operations. Guidelines for the proper (suggested) format for taking minutes are included in the Section Secretary Guide (see section 3 of this Manual). The Section minutes are a major part of the Section's continuity, as well as part of its legal requirements.

**SM 5 - Agendas Prepared and Sent Prior to All Board Meetings**

Sending agendas *prior* to the Board meetings does three things: 1) it shows that the Section Chair is prepared and organized (and allows Board members to prepare effectively); 2) it promotes Board attendance at meetings; and 3) meets the legal requirements for running a Section. Agendas should highlight actions to be taken, time schedule to execute actions, as well as decisions that need to be made.

**SM 6 - Board Meetings Held on a Regular Basis**

While ISA does not encourage meeting for the sake of having another meeting, it is important that the Section leaders meet regularly to assess progress, make and implement policy, and carry out the legal and practical leadership functions of the Section. Section Boards should try to meet at least once a quarter. Due to time constraints in Section leaders’ days, the use of virtual media is an excellent and valid way to have regular Board meetings.

**Leadership Development**

If Sections are to be successful in their goal of better programming, then the Section leaders will have to be successful in their individual and collective roles. ISA wants to provide every opportunity for Section leaders to gain the skills and confidence they need to have a good year. As an incentive for Sections to provide information and training to Section leaders, ISA suggest the following items be considered for leadership development for active and potential new leaders:

**LD 1 - Section Leader Participation in ISA Leadership Programs**

ISA offers a Leadership Development Certificate Program, which covers a variety of topics and teaches a wide range of leadership skills. These resources come in a variety of methods of delivery, such as web-based sessions, power points, and articles – all free to ISA members. If you are interested in just one or two topics or would like to enroll in the Certificate Program a [complete list](#) of topics is available in ISA website. Sections, which their leaders are enrolled to leadership programs, are certain to benefit.
LD 2 - Section Leaders in attendance at District / Region Leadership Conference (DLC)

Each year ISA sponsors District / Region Leadership Conference, bringing Section leaders together to get the latest information on ISA programs and services. The real strength of these area meetings is the ability for Section leaders from the same geographic area to meet and compare notes on what works - and what doesn't. Having District / Region leaders in attendance provides the opportunity to have a direct link with ISA's leadership group, and a chance for these District/Region leaders to find out what ISA can do to support Sections. The training and orientation sessions at these meetings, along with the chance to meet with ISA Staff Representatives and Executive Board members, are other benefits of attending.

LD 3 - Reporting Section Leaders Names to ISA

This is another of the required activities. If ISA is going to be able to provide total support to volunteer leaders and their roles, it needs to know who these people are and what they need. Having the names of all key Section leaders in to ISA by June 15, for Sections that operate 1 July thru 30 June, and by December 15 for Sections that operate 1 January thru 30 December, ensures that they will not miss out on any of the ongoing leadership development programs and regular communications related to their role while also providing access to require tools to do so on the ISA website.

LD 4 - Transition System in Place

The ability to move from one Section "administration" to another without having a reduction in service and member satisfaction is a big challenge. The Sections that are most likely to do this effectively are those which have some specific system for ensuring a smooth changeover.

LD 5 - Section Leaders in Attendance at Other ISA Meetings

Fall Leaders Meetings provide excellent training and experience for current and potential Section leaders. Providing a Delegate to represent your Section at the Council of Society Delegates Meeting held each fall is a key way of participating in Society business. Sections are encouraged to involve their members to actively participate in Society Departments and Divisions, as well as in Standard Committees. Participation of Section members on Departments, Divisions and Standard Committees is a growing opportunity for the Society, being able to be knowledgeable of the needs and differences from each Section, as well as for the Section itself, improve communications between their members a better understanding of other Society activities.

Section Service

ISA understands that all Sections are different in terms of the resources (both financial and manpower) available to support programs and services. There are still some basic
organizational steps Sections can take to ensure at least a minimum level of member service and communications.

SS 1 - Active Committee Chairpersons

Having committees just for the sake of filling an organizational chart is not what ISA encourages. Effective committees can, however, be the building blocks for a strong Section. The various committee guides, and the overall committee management information (see section 3 of this Manual), assist committee chairs in fulfilling their responsibilities. All appointed committees should be active. By active, ISA means that: a committee should have at least three to five members (including an appointed chair); adopt a set of committee goals and a plan of action; and meet at least three times during the year. The suggested Section committees include: Technical/education; Program; Newsletter; Membership; Nominating Committee; Finance and Budget; Student Involvement; Publicity; Honors and Awards; and Exhibit.

SS 2 - Section Member Meetings held on Schedule

Without question, the Section meeting is the most important activity within the Section. Ideas for running good Section meetings are in section 7 of this Manual. Additional programming ideas are in section 3 of this Manual. A minimum of three Section Meetings are required to maintain active Section status.

SS 3 - Section Communications

Communications is one of the primary functions of leadership. Members (especially those who don’t attend Section meetings) need to know what is happening in their Section and throughout ISA. Guidelines for putting together and distributing an effective Section newsletter are in section 3 of this Manual. Sections are encouraged to have a newsletter that is distributed at least quarterly. Additional ways of communicating are through Section website, social networks, groups in professional social networks, as well as instant messaging platforms.

SS 4 - Student Member and Student Section Support

A majority of ISA's Student Sections receive some form of support from a Regular Section and must be affiliated with a Regular Section for this reason. If there is no Student Section for a student member, the person is encouraged to become involved in the local Regular Section. The challenge is to find a way to provide the encouragement, leadership, technical and financial support that all student members and Student Sections need to succeed and be active in ISA. We want to nurture students, involve them and enjoy their leadership for years to come. Spinning students off from your Section to start a Student Section is commendable and will be appreciated.

It is suggested to report three main aspects related to Student members and Sections:

• Activities done to fulfill the needs of Student members in Regular Sections. Some examples of these activities are: conferences of professional
members in education institutions and events; involvement and participation of student members in Section meetings and activities; guided visits to industrial facilities.

- Activities done to help Student Sections to accomplish their goals. Some examples of these activities are: support the location and attendance of subject matter experts to Student Sections events; support the networking with professional members in the Regular Section to coordinate guided visits to industrial facilities and be involved in internship programs; encourage the Student Section leaders’ involvement with District and Society activities and meetings.

- Transition from Student to Regular Sections. Some examples of these activities are: workshops with Student Sections to show the activities of the Regular Section; statistics of Student Section members that become Regular Section members; former Student Sections leaders already involved as Regular Section leaders and officers.

SS 5 - Section Support

An established Section is in a unique position to assist a formative group (Regular or Student) or to guide reactivation of a dormant neighbor. Providing service to the member is the primary motivator for reaching out with guidance, manpower or financial support to a forming or struggling group. By the same token, establishing a sub-Section within your Section also may improve service to your Section members. This is particularly effective where many Section members choose to meet around a specific topic, or there are enough members in a remote location to justify separate meetings.

SS 6 - Education Program

Education is at the root of ISA's existence. Training and education are why the Society was established. Offering training opportunities to benefit local members and industry will strengthen ISA's image in your area and contribute to an effective program for your members.

11. RECOGNITIONS & AWARDS

Individual accomplishment and commitment are the driving force behind ISA’s mission to meet the needs of automation professionals and advance the automation profession. ISA’s recognition and awards programs provide the Society with the opportunity to formally showcase and celebrate the remarkable achievements and contributions of its members, partners, and other automation professionals.

ISA Senior Member grade is ISA’s way of recognizing your advanced educational preparation and professional work experience. It’s a great way to show your success! Senior Member grade is also the prerequisite Member grade for candidacy for "ISA Fellow," one of ISA's highest honors, and for holding elected office at the Society level. Any
ISA Member who meets the requirements may apply for Senior Member grade at any time.
For more information on Senior member grade refer to section 8.

**Honors & Awards**
Each year, ISA conducts an Honors & Awards Gala to acknowledge and applaud those individuals selected for special recognition in the following areas:

**ISA Fellow**
Elevation to the distinguished grade of ISA Fellow is granted to senior Society members in recognition of their exceptional engineering scientific contributions to the field of automation.

The deadline for Fellow nomination is May 31.

**ISA Honorary Member**
The Society conveys its highest honor of Honorary Member to recognize individuals (members or non-members) whose support of and/or contributions to the advancement of the automation profession deserve outstanding recognition.

**Celebrating Excellence Awards**
Celebrating Excellence awards honor companies, ISA Sections and Divisions, and individuals (both members and non-members) for their significant contributions in leadership; technical innovation and presentation; standards development; education; service; volunteerism; and mentorship.

Awards are divided in various categories and each member can nominate participants for each category.

The deadline for nominations is March 31.

Sections Leaders should stimulate the participation of their members in the nomination process.

Celebrating Excellence Awards Categories:

**Education**
**Excellence in Education:** Recognizes an individual who has developed and/or enhanced established educational programs to advance the automation profession in educational institutions.

**Leadership**
**Excellence in Leadership:** Recognizes an individual who has made significant contributions to the industry and/or profession to advance automation.

**Member's Choice**
**Member's Choice Award - Division Leader of the Year:** Recognizes a division leader who has demonstrated leadership and/or provided a specific service to advance the mission of the Society.
Member’s Choice Award - Section Leader of the Year: Recognizes a Section leader who has demonstrated leadership and/or provided a specific service to advance the mission of the Society.

Member’s Choice Award - Student Mentor of the Year: Recognizes a member who has demonstrated leadership and/or provided a specific service to advance the mission of the Society.

Member’s Choice Award - Volunteer Leader of the Year: Recognizes a member who has provided a specific service to advance the mission of the Society.

Society Service
Excellence in Enduring Service: Recognizes 15 or more years dedicated volunteer service to the Society at the grassroots level. May be presented to multiple (up to five) honorees.

Excellence in Society Service: Recognizes 10 or more years distinguished and dedicated volunteer service to the Society.

Division Excellence: Recognizes an ISA Division for development and/or execution of programs and/or services to advance the mission of the Society.

Section Excellence: Recognizes an ISA Section for development and/or execution of programs and/or services to advance the mission of the Society.

Standards Excellence: Recognizes an ISA standards committee member for exceptional efforts in organization, development and/or administration to further the development of ISA standards and for services to advance the mission of the Society.

Technical Innovation
Excellence in Analytical Innovation, Endowed by the ISA Analysis Division: Recognizes an individual who has played a critical role in the conception, design, and/or implementation of an innovative product, process, and/or service in the analytical technology field.

Excellence in Corporate Technical Innovation: Recognizes the company whose contributions and innovations have enhanced social value.

Excellence in Individual Technical Innovation, Endowed by UOP, a Honeywell Company: Recognizes individuals who have played a critical role in the conception, design, and/or implementation of an innovative product, process and/or service. May be presented to multiple (up to five) honorees.

Excellence in Technical Presentation: Recognizes the author(s) of the most outstanding paper, article, presentation, or document published and/or presented on behalf of ISA that introduces a new technology or explains an existing automation process.