



UXPA International Chapter Manual

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About UXPA Chapters

What is a local UXPA chapter?

A local chapter is a group of UXPA members who live or work in a particular locality and who, as a matter of geographic convenience, organize themselves in order to promote the goals of UXPA International.

The goal of a local UXPA chapter is to offer people with the same interests opportunities to come together regularly to share their experiences. Chapter members learn from and encourage each other as user experience professionals, students, academicians, and experts. Local chapters are the “front lines” of UXPA and are therefore vital to its continued success and longevity.

Each local chapter has its own way of coming together and its own types of activities they like to host. Activities might include:

- Lectures with invited speakers,
- Informal meetups at a local park or restaurant
- Usability lab tours or tours of other user experience business processes
- Case study roundtables (where you can bring interesting UX problems to be solved jointly)
- Movie nights
- Opportunities to share professional experiences
- UX show and tell
- Networking events
- Job fairs
- And anything else that may be of interest to the local UX community.

In addition, one of the greatest benefits that membership in a local chapter provides is a handy and convenient network of practitioners that members can reach out to.

While there is no legally binding relationship between UXPA International and its many local chapters around the world, there are strong emotional and professional ties between all UXPA members, as we are all striving to assist each other and to advance the profession. As a result, local chapters have a lot of autonomy: to organize themselves, to reach out to other professional membership organizations, to conduct charitable works, to form partnerships, to define standards, and to advance the UX field directly.

UXPA International exists to support these chapters and to unite them around the world!

A Platform for Networking

UXPA began with the realization that one of the greatest aides for professional and personal development is the ability to meet with colleagues in the same or similar fields. You gain new information on trends, standards, and emerging practices, state-of-the-art technology, direct notice of hiring and jobs information, access to others' experiences and knowledge and you will get the chance to broaden your insights. Whether chatting over a beverage at a local pub or asking questions of a lecturer after a formal presentation, UXPA chapter membership begins over time to feel less like a way to meet professionals, and more like a gathering of friends and family. Many UXPA local chapter members remark that it is the opportunity to meet other interested professionals, to make life-long connections and friendships, that has made a significant difference in their careers and lives. Seeing and getting to know chapter members regularly not only gives chapter members professional support, but personal connections to individuals, companies, and opportunities to speak, write, collaborate, and innovate that would be significantly harder, if not impossible, to achieve otherwise. Many chapter members stay involved with their local UXPA chapter throughout their

professional careers, engaging with friends and colleagues for decades of fun, informative, and career-boosting interactions.

Professional Development

Local chapter meetings and activities allow chapter members to expand their knowledge of UX techniques, best practices in research, design, visual design, and technical development, and more. Chapters bring invaluable education opportunities closer to home than a typical national or international conference, and provide a bridge between the annual UXPA International conferences. Some chapters organize Mentor Programs as a way for their members to grow and guide others within the profession. In addition, involvement with local chapters can itself provide opportunities for leadership and professional growth. Chapter members may take on chapter initiatives, lead a committee, plan an event, or assume a role as a class officer, advisory board member, or fill another guiding role. This promotes skill acquisition, enhances individuals' visibility as organizational and thought leadership, and enables individuals to have an invaluable positive impact on and benefit to their communities, colleagues, and local chapter. Local chapter leaders are encouraged to consider joining the UXPA International advisory board to expand their involvement with the organization.

Exchange of Knowledge and Contributing to UXPA as an Organization

Local UXPA chapters offer, by their nature, venues for members to share their intellectual contributions through lectures, workshops, tutorials, blog posts, white papers, and other forms of communication. Members may review each other's papers and conference contributions; or collaborate on projects, presentations, or panel discussions. Local chapters are a greenhouse for new ideas that can be implemented locally and even shared globally by UXPA International through its formal and informal publications, the UXPA.org website, YouTube channel, webcasts, and other outreach channels.

A Creative and Stimulating Environment

Membership in a local UXPA chapter needn't be overly formal or boring. Local chapters host design contests, outdoor picnics, movie nights, brainstorming exercises, and many other fun and stimulating ways of learning more about UX and the other members of the chapter. Local chapters often organize usability lab tours, "science fair-style" public activities, contests, visits to design studios, and site visits to interesting work places, like air traffic control centers, operations centers, and high-tech manufacturing plants. Learning more about UX in these activities and "extreme" working conditions will often give members good ideas to bring back home. The nature and reach of local chapter events is completely up to local members to define. Whether a chapter is a handful of energetic and dedicated individuals, or a multidisciplinary group comprised of hundreds or even thousands of members, the culture and practices of local chapters are limited only by the imaginations of the members themselves.

Creating a Local UXPA Chapter

Value: Local chapters are an ideal way to create a professional network, advance the skills of the members, and bring interesting opportunities to their lives. The most central activity for a Local Chapter is to have Chapter meetings. These events offer perhaps the most tangible benefits of membership, and they are also the most important way to grow a chapter.

Autonomy: It's up to local chapters to decide whether or not they charge membership dues, what the stated benefits of membership are, and how to invite potential members to consider joining. Many chapters offer free or discounted monthly meetings to entice newcomers, and encourage "Bring a friend" or "Bring a co-worker" theme nights to showcase their local chapter.

Some chapter meetings are formal, business-style lectures or workshops, often held in the offices of local businesses, while others are very informal "meetups" that may be held at a local bar or pub. Chapters may begin at the behest of a groundswell of potential members seeking a banner to rally around, or from the enthusiasm of a handful of visionaries who see opportunities for a new local chapter to grow and thrive.

Worldwide recognition: To date there are over 10,000 persons world-wide who identify themselves as UXPA chapter and/or international UXPA members and that number is growing every day. UXPA International encourages the establishment and growth of chapters wherever interested parties come together to lend their strengths to the collective good.

Process: The process for becoming a local chapter is intended to be straightforward but not inconsequential. By seeking to establish a local chapter, that chapter's leadership is committing itself to raising a local UXPA banner, holding regular events, attracting members, actively seeking ways to help members advance their careers, and striving to work together and with UXPA International for the advancement of the field and of the common good.

The Short Route to Creating a Local Chapter

1. [Contact the UXPA office](#) or your UXPA Regional Director. Your Regional Director will schedule a meeting with you and send you the Chapter Guidelines along with other information that you may need in order to start a local Chapter. They will also inform you if your location already has an active chapter or chapter in formation and, if one does exist, put you in touch with them. The Regional Director will also continue to help you create your Chapter bylaws and guide you through the process of getting approval from the UXPA Board of Directors for official Chapter status. Your Regional Director can also help provide you with a list of UXPA International members in your geographic area. A list of the UXPA Regional Directors and their contact information may be found here: [LINK]
2. [Round up three to five volunteers](#) in your area who are interested in starting a Local Chapter. This is the core team that will help you prepare for the constituting meeting. It may be helpful to arrange one or more informal sessions prior to the constituting one. Both to see if there is enough interest to start a local chapter, and to see how many UXPA members there are in the region. While **not** required, UXPA International suggests that local chapters in formation have at least 10 International members when they petition for Chapter status, to help the local chapter maintain momentum and focus. To help support your growth UXPA International will often grant up to 5 non-UXPA International members with one-year associate memberships to help reduce local costs. It is helpful if volunteers are drawn from one or more companies to ensure that workloads are shared and that the chapter is not too closely associated with one company or organization.
3. [Write a tentative plan](#) for future meetings and other chapter activities to present at the constituting meeting. UXPA strongly suggests that chapters in formation work closely with their UXPA Regional Director to provide sample chapter documentation and to review drafts as appropriate. This plan identify the chapter's planned activities to attract new members and involve current

- members. Examples of activities that attract and engage members include: inviting lecturers to meetings, touring usability labs, conducting site visits to interesting places (manufacturing plants, air traffic control centers, etc.), design contests, tutorials and workshops, special sessions for novice and seasoned practitioners. Creativity counts. Invent your own activities, use them to attract members, and share them with other chapters.
4. [Create a petition](#) to form a Local UXPA Chapter. Include the suggested Chapter name, Chapter boundaries and list any interim Chapter officers. The list of officers typically includes class officers (a President, Vice President, Secretary, Treasurer) and additional officers, as appropriate to the chapter's needs. Your chapter's name is usually constructed using a centrally located town, or the name of the region. The formal name should also include a reference to UXPA. A formal chapter name would look something like: "The Bay Area Chapter of the User Experience Professionals' Association" or "The London Chapter of the User Experience Professionals' Association." Informally, chapter names are often shortened for easier reference, *e.g.*, "London UXPA." It is also important to find a name for the chapter that reflects the geographic boundaries of the chapter. Geographic boundaries are formally approved by the UXPA International Board of Directors and may be changed from what you initial propose in your petition.
 5. [Find volunteers](#) who will help develop the Chapter Bylaws in accordance with the suggested guidelines in the UXPA Chapter Guidelines, or peruse sample Bylaws on the UXPA International website. Submit your group's Bylaws to your Regional Director and prospective Chapter membership for review.
 6. [Organize a constituting meeting](#) with approximately ten people that currently are, or are prepared to become, members of this new the Local Chapter. The Petition should include: the proposed chapter name, geographic boundaries, and list the interim chapter officers. This list of officers typically includes: a President, Vice President, Secretary, Treasurer, plus any additional officers you deem appropriate. The Petition should be signed at the meeting (with each name printed or typed next to the signature) by at least ten members requesting to be recognized as a local Chapter of UXPA. Have the President sign the Charter. This process may be "virtual" if an online constituting meeting would be more appropriate for your chapter. Signing petitioners do not need to be UXPA International members, but this is encouraged.
 7. Submit the Petition, along with the Chapter Charter, proposed Bylaws and the proposed boundaries of the Chapter to your Regional Director and the UXPA Board of Directors for approval. Your Chapter Sponsor will keep you updated about the progress of your petition.

The Organization of a Local Chapter

Local Chapters are a vital part of UXPA, and the Chapter Class Officers occupy the most visible leadership positions in the Chapter. In addition to being key to the success of a Chapter's programs, the Class Officers (assisted by an advisory board for larger chapters) can make important contributions to the success of UXPA-wide programs. Most Chapters start out with a small group of three to four class officers, but as Chapters grow, the leadership roles of the chapter may grow as well to incorporate the evolving needs and capabilities of the chapter. Advisory Boards are typically elected by local chapter members. Advisory Board members then appoint class officers. If the chapter does not have an advisory board, then the chapter membership may elect class officers directly via annual or term elections. As chapters grow, many form additional sub-committees to address various aspects and projects of the chapter. Committee leaders, who report to the class officers, are usually appointed. Committees might be formed to manage many aspects of chapter life, including membership coordination, volunteer management, World Usability Day or other special event planning, annual conference planning, and more. It is up to each chapter to determine its ideal leadership structure and UXPA-International is always willing to provide advice.

Another important actor in relation to chapters is the Regional Director. The Regional Director is a veteran UXPA International member elected by the UXPA's Board of Directors. The Regional Director is responsible for overseeing the operation and activities of one or more Chapters according to geographic region. The Regional Director will be an essential part of helping to get a Chapter started. The Regional Director is also a member of the UXPA Chapters Committee and your Chapter's link to the Association's

Board of Directors. As such, the Regional Director is the conduit to a wealth of UXPA services and opportunities.

A Local Chapter is part of the UXPA organization, but it is responsible for its own finances and is its own distinct entity. No legal relationship exists between local chapters and UXPA International. A chapter's first source of operating income is often chapter dues and/or sponsorship donations to fund activities. Not every chapter charges membership dues, but among those who do, they are responsible for collecting their own dues, separate from UXPA International dues. If your chapter opts to collect dues and take monetary donations to support its events and activities, it may be advantageous for the chapter to open a bank account, according to the appropriate local laws, in order to help ensure proper money management. The establishment of a bank account and payment avenues may make it easier for businesses and individuals to sponsor events and for the chapter to pay for services.

It is advantageous when planning local chapter events, to define ways to ensure that chapter activities may be self-sustaining; that is, each activity pays for itself. This may occur through corporate donations (of meeting space, food, or money), individual contributions (of time, services, or money), the collection of membership dues, or other appropriate, legal, means decided upon by the chapter leadership. This may seem daunting at first, but many organizations, when asked politely through associated colleagues or funding request channels are happy to provide support for local UXPA chapter events and UXPA encourages you to reach out to potential sources of local support as needed.

UXPA Growth

Local chapters have proven to be a very fast way of growing UXPA and the usability profession. For example UXPA's earliest chapters have shown impressive figures of growth of the number of members of in their respective regions. Worldwide, local UXPA chapters range in size from a few dozen members to, in some cases, over 2000 members!

The most central activity for a local chapter is the chapter meeting. Chapter meetings and all that they can offer are among the most tangible benefits of membership, and they are also the most important way of adding new members to the chapter. In order to show potential new members the benefits of chapter members, we recommend that chapters who charge attendance dues allow all newcomers to attend at least one meeting without joining or paying the non-member door-fee. "Bring a friend" or "Bring a co-worker" theme nights are also successful ways of showcasing the Local Chapter.

Chapter growth through the addition of new members is strongly encouraged. A larger organization carries more clout, for example in discussions with governments, arranging for benefits with sponsors, and for broadening the impact of local activities and events. A larger, active organization offers increased credibility to the members of the organization on a global, national and local level.

How to Contact UXPA

These are the basic points of contact when you want to start a chapter:

- The primary UXPA International phone number
- The primary UXPA International email address
- The organization's mailing address
- The UXPA Chapter Director
- The four UXPA Regional Directors

Patience is Appreciated

UXPA leadership strives for responsiveness and clarity in its communications with the membership, chapter leadership, sponsors, and prospective chapter leaders. Once you have reached out to UXPA we will make every attempt to respond promptly. Occasionally, because UXPA is a global organization run by volunteers who are donating their time in addition to their employment and other individual responsibilities, it may take a few days to respond to a query. In addition, electronic communication being what it is, occasionally messages, particularly electronic ones, may go awry or be caught/blocked by an email filter. In the event you have reached out but not received a response within one week, the UXPA Advisory Board never minds a reminder overture or your reaching out to a different member of the leadership or through a different contact channel. We appreciate your patience.

Developing Chapter Bylaws

Chapter Bylaws are the rules by which a Chapter functions. Chapter Bylaws exist in harmony with the UXPA Association Bylaws.

Your group should begin drafting bylaws by reviewing the Chapter organization, the UXPA Bylaws and **the Guidelines for Creating Chapter Bylaws and the Chapter Bylaws Template**. This review will help prevent possible conflicts between your Chapter bylaws and the UXPA Bylaws. After this review, you can determine if you want to adopt the bylaws presented in the Chapter Bylaws Template, adapt one of the sample bylaws available on the UXPA International website, or create your own, following the Guidelines for Creating Chapter Bylaws. The template Bylaws have been reviewed and approved by a US attorney familiar with Association Management law.

If you decide to follow the guidelines and create your own Bylaws, UXPA strongly recommends that you have the Bylaws reviewed and approved by a local attorney familiar with Association Management law and the laws of your region, state, province, and country. This review may be done after your bylaws have been submitted to UXPA, with any alterations submitted at a later date.

As you draft your Chapter Bylaws, bear in mind that the best Bylaws are those that pared down to describe only the rules under which your Chapter actually operates from one year to the next. Remember that anything you put in your Bylaws can be changed only by the standard amendment procedures you include in your Bylaws. Consequently, your Chapter's operations will be least inconvenienced and your Bylaws will function most effectively as a living document if you leave out information that is likely to change or become outdated from year to year, such as the names of individuals.

While UXPA hopes your chapter will grow and prosper into perpetuity, sometimes chapters become inactive. Thus UXPA recommends your bylaws include a section on chapter dissolution. UXPA Chapters are chartered by the UXPA Board of Directors and thus can be dissolved by a two-thirds vote of the Board when it is satisfied that the Chapter is inactive, that there is no reasonable hope of its immediate revival, or when it is satisfied that such action is in the best interest of the Association. Your chapter also has the right to terminate the Charter between the UXPA Association and the chapter, and, as a result, relinquish all association with UXPA and cease to exist as a UXPA Chapter.

Reviewing Draft Chapter Bylaws

The draft bylaws developed by your chapter leadership should be reviewed by the following groups:

- Your Chapter Leadership, who will review and comment upon the initial draft bylaws
- Your Regional Director, who will ensure that your chapter's second draft bylaws do not conflict with those of UXPA. Incorporate comments from the Regional Director and develop a final draft. Otherwise, you can move to the next step of the procedure.
- Your Chapter's membership, who will review and approve the formal draft of the bylaws. Be sure to give them ample time to review the Bylaws. If the vote for approval of the bylaws is taken at a

chapter meeting, make sure that absent members are given an opportunity to vote by absentee ballot or electronic comment.

Once your Chapter Bylaws have been reviewed and approved by the UXPA Board of Directors and you've been granted Chapter status, follow this procedure:

1. Ask your Chapter Secretary to maintain the formal Bylaws with the Chapter's official records.
2. Have the Secretary maintain a supply for distribution to new members (physical copies and/or electronic).
3. Send a copy of your Chapter Bylaws to your Regional Director for inclusion in your Chapter's file.
4. Regularly review the Bylaws (at least once every two years) to ensure that they correspond to your current situation, problems, and needs. When you consider substantive changes to the bylaws process, repeat the review process, including sending the revised bylaws to the UXPA office and your Regional Director.

Here are some tips to help you avoid conflict with the UXPA Bylaws:

- Consult the current version of the UXPA Bylaws to make sure that you do not make provisions for depositing Chapter funds in inappropriate financial institutions.
- Do not give your Chapter authority that it does not legitimately possess. For example, a UXPA Chapter may not determine its own geographic boundaries.
- Do not identify Chapter services as being "for members only." Because UXPA is a not-for-profit educational and charitable organization, we must make our services available to members and non-members alike. However, the local Chapter may charge non-members higher fees than charged to members for those services.
- Consider including some sort of caveat that your Bylaws are, by definition, superseded by the UXPA Association Bylaws. For example: "Should situations not addressed in these Bylaws arise, the Bylaws of the Usability Professionals' Association are in force. Should the Association Bylaws be changed such that they conflict with these Chapter Bylaws, the Association Bylaws take precedence. Chapter Bylaws must then be amended as soon as possible to bring them into agreement with UXPA Association bylaws."

Sample Petition to Form a Local UXPA Chapter

Once you are ready to begin the Chapter Constituting process, your chapter leadership should draft a Petition to Form a Local UXPA Chapter. The following is a sample petition:

To: The Board of Directors of the Usability Professionals' Association

We the undersigned do hereby request recognition as charter members of the [Chapter Name] Chapter of the UXPA. We aim to serve members in the area of [Geographic location]

The goals of this Chapter are: [List Goals]

We request recognition and approval as an official local chapter of UXPA. Chapter Bylaws are attached to this document, along with a signed Charter.

Interim officers are as noted below:

President: [Printed Name], [Signature], [UXPA Membership Number (as appropriate)]

Vice-President: [Printed Name], [Signature], [UXPA Membership Number (as appropriate)]

Secretary: [Printed Name], [Signature], [UXPA Membership Number (as appropriate)]

Treasurer: [Printed Name], [Signature], [UXPA Membership Number (as appropriate)]

Local chapter members: [List members]

Organize a constituting meeting

You will need at least five, ideally ten, people that are prepared to become members and support the Local Chapter. Use all available means to reach as many potential members as possible. The most effective ways of doing this are:

UXPA Membership Directory: If you, or a member of your potential chapter leadership is a current UXPA member, you should have access to the current year's Membership Directory. The directory is sorted by geographical areas and you can identify current members from your region. Also, you can contact the UXPA at anytime for a list of members or to verify the current status of memberships.

Contacts and networks: Go through your professional contacts and list all people that you think may be interested in supporting the chapter. It is amazing how many names a group of three to five people can generate. Send them an e-mail explaining what you propose to do, and how they can help. Invite them to the meeting (and if they can not attend offer to keep them informed.)

Other professional organizations: Online listings of local companies, universities, and the local Chamber of Commerce will give you leads to sources of other potential members. Whenever possible, your first contact should be personal if an appointment can be arranged. An initial telephone call, followed by an email explaining the objectives and significance of your organization, may prove very useful. If you are successful with the leaders of these groups, you will be in a good position to enlist the support of the membership of their organizations. When contacting these people, remember to encourage them to join both the UXPA and your local chapter. UXPA membership is not required to join a local UXPA Chapter, but it is encouraged.

Social media and advertising outreach: With larger newspapers, you should contact the editor of the appropriate department, or perhaps the science writer, and explain your activities. The organization of a local group of professionals (in any field) is normally considered news, and your chances of getting into print are good. Remember that newspapers are interested in knowing who you are, what your organization represents, its relationship to their readers, and names, names, names. You may also be able to submit a brief summary of your upcoming activities to a newspaper's calendar or other online event calendars covering your geographic area. It is always necessary to include the time and place of your meetings and whom to contact for further information. Your chapter leaders should make use of social media channels, as appropriate, to spread word of your organization's activities and to enlist potential members. Finding ways to list your activities online can be very helpful as online resources generally have a wide reach and are available 24 hours a day.

Listings in trade press: Many of magazines that focus on usability have a section listing up-coming events, particularly on their websites. You should try to get all relevant chapter activities (including the constituting meeting) into these listings. A short article in a magazine, describing your efforts would not do much harm either...Be creative about sharing blog posts, notices, and other articles of interest with other UX organizations who often will not mind helping you expand your outreach.

Please note that, while UXPA authorizes and encourages this type of notification, care should be taken to avoid representation of your group as an 'official' UXPA group at this stage. The right to represent yourself as a recognized UXPA chapter, and other rights associated with affiliation with UXPA are available to you

only after a charter has been granted. If you have any questions about this, you should contact your Regional Director. Typically local chapters in the startup phase are considered “chapters in formation.”

Sign the Charter

The Charter is the 'contract' between the local Chapter and UXPA and identifies the 'legal boundaries' of the relationship. The President of your Chapter should sign the Charter and identify the name of the Chapter. The petition, proposed bylaws, and Charter should be submitted to UXPA. Once the petition for Chapter status is approved, the President of UXPA will sign the Charter and return a copy to the local Chapter.

Submitting Documents for Review and Approval

Submit the Petition, Proposed Bylaws, and the Charter to the UXPA Chapters Committee and UXPA Board of Directors for approval. Your Regional Director will update you about the progress of your petition.

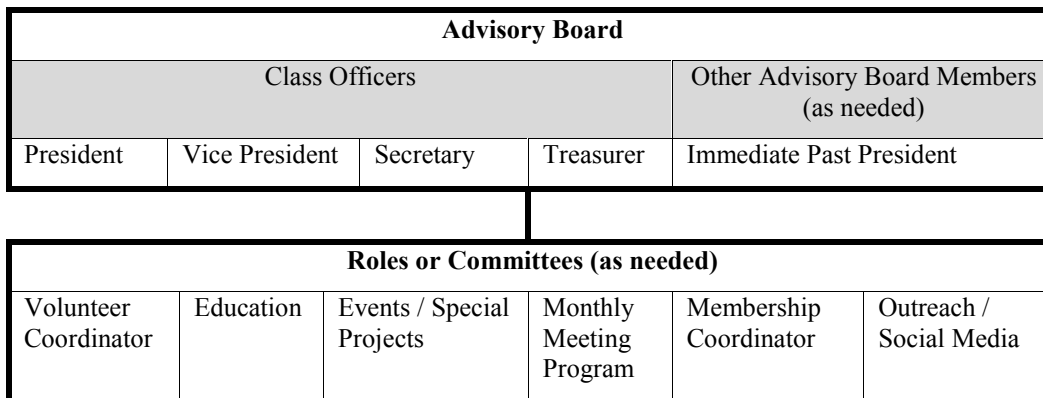
When approval arrives, celebrate, and get to work to implement what you have suggested. Good luck, and remember to share your ideas!

Leading a Volunteer Board

Leading Local Chapters

Local chapters are a vital part of UXPA, and the Chapter President occupies the most prominent leadership position in the Chapter. In addition to being a key to the success of the Chapter's programs, the President can make important contributions to the success of UXPA-wide programs.

Article 16 of the UXPA Bylaws covers the scope of a Chapter's existence and operations. It is very important that you read this material when you assume office. You also should try to attend the special workshop for Chapter leaders at the annual UXPA Conference. Presidents who are unable to attend are welcome to send other officers in their place and should try to do so. Many regions also hold Chapter leaders' workshops once a year. You should attend them if you can. The following is an organizational chart for a typical UXPA Chapter., albeit a large one. Typically a chapter's advisory board is elected while class officers and committee managers, who report to the advisory board, are usually appointed.



Note: Other organizational structures exist for UXPA Chapters, and you are encouraged to find a structure that suits your chapter best.

Your Regional Director

Your Regional Director is a veteran UXPA member who is elected by UXPA's membership and responsible for overseeing one or more chapter's operation and activities. Your chapter's Regional Director will be an essential part of helping you to get a chapter started. A Regional Director will communicate with you throughout the year and will be available to assist with your questions or problems concerning UXPA. The Regional Director is your chapter's link to the UXPA Board of Directors and, as such, is your conduit to a wealth of UXPA services and opportunities.

We request that chapters submit a status update report to their Regional Director before UXPA's two annual board meetings (winter meeting and the annual conference). This report can consist of an email describing: chapter status, any significant changes to the chapter or its goals, current membership, upcoming events and activities, any requests for support, and any other information about your chapter you feel would be helpful for your Regional Director to know. Your Regional Director can be an excellent resource when your chapter considers conducting a membership drive, establishing a new practice or activity, or building a new public relations program. You may consider inviting your Regional Director to a

chapter function, to be a speaker for a monthly meeting, keynote a conference, or be a guest of honor at your awards dinner.

These visits provide an opportunity for you, your advisory board, and your Regional Director to confer about chapter matters. At the same time, a visit allows the Regional Director to assess the strengths and needs of your chapter and to meet potential candidates for chapter- and UXPA International-level offices and committees.

Your Regional Director can do a better job if you work together and communicate on a continuing basis. For example, you should respond promptly to requests from your Regional Director. If your Regional Director requests a report for an Association board meeting, submit a complete and informative report promptly. The Regional Director will attempt to visit each chapter at least once during their three-year term. Please note, some Regional Director's areas of responsibility cover large geographic distances, often across national boundaries, and individual visits may not always be possible.

If your Chapter has developed a long-range plan, submit the plan to your Regional Director. Any changes to the plan should also be re-submitted on a timely basis. Your Regional Director serves as an advisor to your chapter and a conduit for sharing your successes and challenges with the UXPA International board of directors. As an advisor, the Regional Director is neither a formal leader nor a voting member of any local chapter. Maintaining a positive relationship with your Regional Director should prove advantageous for both parties.

The Chapter Advisory Board

As defined in the UXPA Bylaws, the local chapter Advisory Board or "Chapter Council" is a group of elected chapter officers that manage the chapter's affairs. The Advisory Board is generally composed of representatives elected by the membership. Advisory board members then appoint "class officers" from within their ranks. Class Officers typically include: a President, Vice President, Treasurer, Secretary, and Immediate Past President. Thus a class officer is by definition also an Advisory Board member. This enables the membership to identify its preferred representatives and for the advisory board to define specific roles for the board members. Board members who are not class officers are encouraged to identify areas of responsibility based on their interests and capabilities. For example, a board member who is not a class officer might oversee the chapter's website, coordinate volunteers, or guide a special project. A chapter's advisory board composition may vary depending on the chapter's bylaws.

A chapter's advisory board typically meets at pre-determined times throughout the year, at the call of the Chapter President, and/or at the request of any two of its members. A majority of the board (at least three of five members) constitutes a quorum. A simple majority rules on questions brought before the board. If the board decides that more than the current number of board members are required for efficient operation, a proposition to increase the number of elected board members and change the chapter's bylaws may be brought before the chapter's general membership. The proposition must specify the anticipated responsibilities of the new board member(s).

Advisory Board Responsibilities

A local chapter's advisory board formulates and defines chapter objectives. It also identifies some of the specific projects and programs by which these objectives can be reached. The board assigns projects and programs to appropriate committees and individuals for implementation, refinement, or enhancement. The board works closely with committees and individuals with special assignments.

In collaboration with appropriate committees, the advisory board seeks to provide some or all of the following activities:

- monthly or bi-monthly meetings offering stimulating learning opportunities and strong membership involvement
- a close liaison among the chapter, Regional Director, UXPA, and other communication groups

- a newsletter that reaches members at least five days before meetings (separate meeting announcements may also be appropriate)
- a chapter membership drive
- a membership directory
- facilitation of professional development opportunities such as a workshop, meetup, seminar, or regional conference
- collection and distribution of employment information
- chapter participation at UXPA Annual Conferences
- finding ways to gain support of business and industry for the chapter and the Association
- encouraging members to contribute to UXPA publications
- providing recognition through chapter and UXPA programs

Class Officers

Chapter officers are typically: the President, Vice President, Treasurer and Secretary. The duties of the Vice President are sometimes divided into two positions: First Vice-President and Second Vice-President for more efficient operation, particularly if the vice presidents' duties are to seek out presenters and host locations for the purpose of organizing and executing monthly meetings. All officers must be appointed or elected in accordance with Chapter bylaws, or in their absence, with the UXPA bylaws.

Chapter Elections

One of your chapter advisory board's most important responsibilities comes toward the end of your administration: the election of your successors. The future success of the chapter depends on the caliber of those who are elected. With this in mind, observe and evaluate your members. Who will represent and support the organization well? Are they volunteering for personal gain or the betterment of the organization? Do they have skills appropriate to the role's responsibilities? Will they work well with the other board members? Do they bring a unique skillset or interest in a special project? If not, can they grow into the position with mentoring and the partnership of the other board members?

It is the President's duty to see that procedures for chapter elections are carried out properly. Elections may be carried out in accordance with your bylaws and should be fairly planned and executed to ensure each individual running for a board position has a fair chance of being elected. Notify your membership of the relevant dates associated with upcoming elections sufficiently in advance to ensure that the membership has a reasonable amount of time to get to know the candidates and make arrangements to vote. Encourage candidates to share their professional backgrounds and reasons for wanting to join the board with the membership. Elections themselves may be through the use of physical ballots or electronic voting (an online survey, for example), as your local bylaws and laws dictate. The results of the election should be reported to the UXPA office and the Chapter Sponsor as early as possible so the new board members can be congratulated and invited to a special workshop at the next UXPA Annual Conference.

Responsibilities of Chapter Officers

The Chapter officers, committee managers, and committee members should follow the Chapter Bylaws, UXPA Bylaws and the policies and procedures of UXPA in carrying out their responsibilities.

It is important to develop written responsibilities for all Chapter officers, committees, and committee managers. Because the structure of individual UXPA Chapters may differ, the responsibilities described in this document are meant only as guidelines.

Chapter President's Responsibilities

The Chapter President heads the advisory board and is responsible for all operations of the chapter. The Chapter President should be enthusiastic, energetic, responsive, good at solving problems, and good at resolving disputes. The President should also be gracious and a good listener. The Chapter President:

- conducts regular meetings of the advisory board and class officers (at least three meetings with the full advisory board and a minimum of five meetings with class officers per year are recommended)
- assigns duties to other officers soon after their election
- suggests schedules for ongoing Chapter programs both within the Association and in collaboration with other professional groups
- explores topics for the coming year's meetings with the Program Committee Manager and other officers
- appoints special assistants or committees for specific tasks not easily managed by standing committees
- applies and maintains controls for budgets, expenditures, and other fiscal activities and, together with the Treasurer, authorizes and/or signs all chapter payments
- reviews contents of chapter newsletters and social media outreach prior to publication
- writes articles and columns for the chapter newsletter
- leads in the formulation of goals and policies for the chapter
- contacts committee managers periodically to obtain status/activity reports, which are then submitted to the chapter officers
- submits a report describing chapter activities to the Regional Director prior to each UXPA Board of Directors meeting
- submits informal reports frequently to keep the Regional Director informed about the general condition of the chapter
- ensures that procedures for chapter elections are carried out properly

Checklist for Chapter Presidents

Early planning will pay off throughout the year. As soon as you are nominated, you should start planning your term as Chapter President.

- Think about your vision for the Chapter.
- Contact each person running for a contested office. Ask the candidates what jobs they would like if they are not elected. You need them on your team.
- Consider how each position could or should fit in with your vision.
- Fill the committee and newsletter editor positions. Ask candidates and non-candidates to take on some responsibility. Members who refuse large jobs often will accept smaller ones. Remember that membership involvement builds a strong chapter team, so get as many people involved as possible.
- Announce your committee appointments and the date of your first advisory board meeting at your installation meeting.
- Review the criteria for the Chapter Achievement Award to gain an understanding of what an excellent Chapter is considered to be.

Vice President's Responsibilities

The Vice President:

- maintains a special awareness of all Chapter operations and confers frequently with the Chapter President, not only to advise and assist, but also to gain knowledge that could prove useful if the Vice President becomes President
- helps formulate policy and establish the Chapter's long-term and short-term goals
- monitors the Chapter's finances on a continuing basis
- assumes the duties of Chapter President when the President is unavailable
- performs other duties as defined by the President

Secretary's Responsibilities

The Secretary:

- takes minutes at Chapter Council and other Chapter meetings (or arranges for a substitute)
- prepares and distributes copies of meeting minutes to officers within ten days
- prepares correspondence related to Chapter business at the direction of the Chapter President

Treasurer's Responsibilities

The Treasurer:

- prepares a budget at the beginning of the Chapter year
- establishes and maintains a checking account and/or credit card (as appropriate) for current operations (arranges for signature cards and other documents required by the bank. Checks must be signed by the Treasurer and co-signed by the President or vice-President.)
- establishes and monitors a savings account and/or certificates of deposit when Chapter funds exceed those needed for current operations
- deposits Chapter funds and pays invoices promptly
- transfers funds from the operating account to the savings account when appropriate, with the concurrence of the Chapter President
- renews nonprofit mail permit (if one is used) when due and periodically deposits additional funds in a mailing account at the post office
- prepares a monthly report of Chapter income and expenditures for review by the Chapter President
- prepares reports of income and expenditures on Chapter projects, making comparisons with the budget every 60 days for current projects and at the close of each project
- develops a detailed year-end report (as of December 31) of all financial transactions; grouping income and expenses for each major activity.
- completes and signs a year-end report for the UXPA Treasurer on a form provided by UXPA

- mails the year-end Chapter financial report to the UXPA Treasurer as soon as possible, but no later than January 5, to ensure a prompt dues rebate to the Chapter

Monthly Planner for the President and the Council

January - February

- Hold an organizational meeting of your new advisory board and your committee managers. Discuss your goals as chapter leaders and request the help of your officers and committee managers to implement these goals. Draft a mission statement. Review/revise your vision with the board.
- Review the file of the past Chapter President. This file should include the UXPA Bylaws, the Association guidelines, and this publication. Request any missing information from UXPA.
- Make certain that all committee managers' files are transferred. Give committee managers copies of pertinent information.
- Ensure that the past Treasurer continues to function as Treasurer until the Chapter financial report is filed. The Association Treasurer will send you the report form. The report must cover the Association's calendar year (Jan 1 through Dec. 31) and must be sent to the Association Treasurer no later than January 5.
- Make sure the Treasurer's records are transferred.
- Change the signature card for the Chapter's bank account to reflect the new officers: the Treasurer and either the Chapter President or vice-President. The signature of the Treasurer and either the chapter President or vice-President are required for withdrawal of funds, as authorized by the advisory board.
- Have each board member draft goals for the year that are aligned with and support your chapter's vision and mission. Ask each officer to present his or her goals to the board.
- Plan the program for the entire year. Submit the plan to the Regional Director to keep him/her informed.
- Publish a meeting schedule for the entire year. Although it may not be possible to line up all the speakers, you can set the meeting dates, determine the program subjects, and assign the job of finding speakers to fill the slots. In all practicality, planning for six months out is acceptable.
- Invite your Regional Director to participate in one of your meetings.
- Confirm that your Treasurer has prepared a budget for the year.
- Verify that your mailing list is up-to-date and includes your Regional Director, the Association Vice President, and UXPA. You may prefer to have an expanded list that includes potential members and newsletter editors of other chapters in your region.

February - December

- Hold advisory board meetings and schedule progress reports from all committee managers.
- Write a Chapter President's column for each issue of your newsletter.
- Ask your Program Committee Manager to have a guest register available before each meeting begins.
- Write a welcome letter to each new member and follow up by asking the member to consider attending the next meeting. Be sure to greet and introduce all new members at their first meeting.
- Monitor the progress of all new appointees and elected officers.

- Listen to your members' comments especially the negative ones. Ideas, suggestions, and criticisms can help you and your chapter.
- Remind key people of deadlines for the chapter newsletter and social media outreach.
- Make notes of chapter accomplishments for use in your Chapter Achievement Award qualification form.
- Submit names of qualified members that can be recommended for election to UXPA office.
- Watch for a quarterly list of unpaid members, which the UXPA office sends to chapters. The office also sends dues renewal reminder notices to any member who has not renewed membership.

April

- Initiate a membership drive.
- Notify the Regional Director if you, as incoming President and others in leadership roles will attend the Chapter Leaders' Workshop at the UXPA Conference.

June

- Inform your Regional Director of your chapter's activities for a report to the Board of Directors during the Board Meeting at the annual conference.

October

- Activate the nominating committee. This is a very important task, which takes considerable time and effort. Monitor the progress of the committee closely.

December

- Submit a report of your chapter's activities to the Regional Director for a January report to the board.
- Send a list of incoming officers to the UXPA office and the Regional Director. Include area code, telephone number, and address for each name.
- Have the chapter financial books audited.
- Make sure the Treasurer knows that the term in office lasts until the chapter financial report is filed.

January

- See that all committee records are promptly turned over to the new administration.
- Thank all of your chapter officers, committee managers, and other volunteers.
- Relax and look back on an interesting and successful year.

Chapter Committees

Standing and special committees are necessary to perform chapter functions such as nominating, membership, and program. Committee managers should meet often with the advisory board to report on

their progress. As appropriate, “committee” could represent a single individual, but be careful of overloading your volunteers!

Monthly Meeting / Program Committee Manager’s Responsibilities

The Monthly Meeting / Program Committee Manager:

- develops programs for monthly and special meetings, schedules speakers, meeting places, and meeting dates with concurrence of the President (meeting sites can be assigned to an arrangements committee manager)
- provides details to the newsletter editor early enough for the program description to be included in the outreach communications scheduled to reach members at least ten days before the meeting
- arranges to receive and record reservations and advance payments for meetings and special events or sets up online signup event notifications
- provides a record for each Chapter meeting to of attendees’ names, membership status, and contact information, as appropriate
- reports the number of attendees to the advisory board and gives names and contact information of nonmembers to the membership committee manager for follow-up
- guides preparation and mailing of special meeting notices and/or contacts members
- coordinates planning and operation of various Chapter activities such as seminars, competitions, and banquets when requested by the Chapter President (typically, this involves recruiting volunteers, managing them, and reporting on their progress)

Monthly Meeting / Program Committee’s Responsibilities

The program committee plans, schedules, and coordinates programs for Chapter meetings. These programs should meet the professional growth needs of the Chapter. A survey of the Chapter membership will help identify these needs.

The program committee is responsible for:

- determining seminar themes and program requirements
- contacting speakers for monthly meetings and other events
- securing biographical and presentation data from each speaker
- providing copy for Chapter/seminar publications
- keeping open and active lines of communication between the committee and each speaker from initial contact through the presentation
- making final arrangements for local presentations
- arranges for the meeting registration area, meeting rooms, AV equipment, catering, and coffee breaks
- sends the registration notification
- receives / oversees registration materials and fees
- confirms registrations
- welcomes attendees the day of the seminar
- If your chapter charges dues, verifies that all attendees of meetings and seminars are members of UXPA and/or chapters. Prospective Chapter members may attend one meeting or seminar to “check

things out” before becoming a member of the Chapter and/or UXPA, or if the event is free, may attend without joining.

- welcomes first-timers and, hands them registration material and encourages them to join the chapter and UXPA

Education Committee Manager’s Responsibilities

In smaller Chapters these responsibilities could be taken over by the program committee. The education committee manager:

- serves as Chapter liaison to related UXPA international committees
- designs, arranges, publicizes, and conducts at least one seminar or workshop aimed at improving user experience / usability engineering competencies of chapter members and others (workshop or seminar programs are approved by the advisory board)
- publicizes educational and professional development opportunities in the newsletter and at Chapter meetings, such as calls for papers for professional meetings and surveys related to education and training
- reviews books about education in UX engineering, reports on them for the Chapter newsletter
- designs and coordinates at least one innovative educational activity for members, *e.g.*, a weekend workshop.

Outreach / Social Media Committee Manager’s Responsibilities

In smaller Chapters these responsibilities could be taken over by the newsletter editor. The Outreach / Social Media committee manager:

- works to increase business and public recognition of the chapter and UXPA
- publicizes UXPA goals, programs, and services to members, prospective members, and their management
- obtains details of each monthly meeting and publicizes the meeting well in advance, through the newsletter, flyers, and other media
- seeks the support of local sponsors
- publicizes special seminars and workshops held by the Chapter
- serves as a liaison with other UXPA Chapters
- serves as a liaison with chapters and branches of other usability engineering organizations
- helps prepare brochures and flyers as needed for the chapter’s projects and events
- develops publicity for the chapter and its activities
- works in support of other committees preparing and dispensing press releases, brochures, special mailers, and other publicity-oriented materials
- serves on the awards, seminar, and membership committees to coordinate publicity for each activity with those of the chapter as a whole

Nominating Committee Manager’s Responsibilities

The nominating committee manager:

- directs a committee of three to five members who preferably have a wide circle of acquaintances in the chapter
- conducts a preliminary planning session to assign responsibilities, establish deadlines, and distribute copies of the membership roster
- invites members, through the newsletter and announcements at Chapter meetings, to run for office or to suggest possible candidates
- assembles the committee, as needed, to evaluate the qualifications of possible candidates proposed by chapter members, as well as by committee members
- assigns committee members to approach possible candidates who are qualified to run for office to determine their willingness to stand for election
- advises the advisory board of potential candidates who are willing to run, and announces the slate in the newsletter and at a chapter meeting
- guides the election process from preparation of a ballot and holding the election to overseeing the collection and counting of ballots (the election should be held well before the final chapter meeting of the year, preferably in September or October)
- reports results to the advisory board and the candidates as soon as they are known
- gives results to the newsletter editor for publication before the installation ceremonies
- gives the chapter Treasurer the names and addresses of the elected officers for inclusion in the chapter's financial report to the Association
- reminds the President to notify the UXPA office and Regional Director of new officers
- may be assigned to identify candidates for other purposes, such as local recognition, Distinguished Chapter Service Award, or candidates for Association-level office

Newsletter Editor's Responsibilities

The newsletter editor:

- writes, edits, produces, and distributes an attractive, professional, accurate, and informative monthly newsletter that reaches members at least five days before meetings. (The UXPA office and the Regional Director should also be on your chapter's mailing list.)
- works with the President to communicate chapter plans, objectives, goals, and progress
- recruits chapter members to assist with writing, editing, and producing the newsletter, and provides opportunities for input from other members
- assumes joint responsibility for the quality, accuracy, and content of the newsletter (content should be received and approved before publication by the chapter President)
- understands and complies with standard guidelines for the ethical and responsible reporting of information
- generates support from business and industry for assisting with production costs
- submits news about chapter meetings, conferences, or other items of interest to the UXPA membership
- exchanges newsletters with other chapters
- receives columns written by the Regional Director and includes items in the chapter newsletter as appropriate

Membership Committee Manager's Responsibilities

Each chapter handles its membership responsibilities in its own special fashion. In general, the following responsibilities apply.

- receives and forwards original UXPA membership applications to the Association
- receives and updates chapter roster and copy of membership applications, changes of address, and so forth, and maintains the membership records.
- forwards changes of address, etc. received directly from members to the UXPA office for processing through official channels
- contacts and welcomes new members and sends them the most recent issue of the chapter newsletter
- maintains a complete, up-to-date mailing list; adding, deleting, and changing information in accordance with information received from the UXPA office
- operates a system for producing mailing labels, or e-mail lists, based on the mailing list
- submits membership material (additions, deletions, changes) to the newsletter editor on a regular basis
- works with the directory committee to prepare and publish a membership directory each year
- organizes and directs an active membership recruiting campaign. Membership recruiting brochures may be obtained from UXPA.

Membership Committee's Responsibilities

The membership committee's primary responsibility is to increase the Chapter membership. Obviously, this is a fertile field for an innovative, ambitious committee.

The membership committee:

- notifies the Chapter President and editor of new members and sends appropriate notification to UXPA
- maintains membership files
- transmits address and telephone changes to the Association
- regularly updates and issues membership rosters to chapter members, as appropriate

Volunteer Coordinator's Responsibilities

Each chapter handles its volunteer coordination responsibilities in its own special fashion. In general, the following responsibilities apply.

- Communicates volunteer opportunities to the membership
- Fields volunteer offers and queries
- Presents volunteer capabilities and interests to the Advisory Board for assignments to active roles
- Oversees volunteer efforts
- Serves as a liaison between volunteers and the advisory board.
- Maintains a database or other record of volunteers including: their names, interests, skills, availability, and contact information
- Ensures that volunteers are involved in the growth of the organization in an equitable unbiased fashion that enhances their visibility within the organization, understanding of the chapter leaders roles and practices, and that utilizes their skills fairly. Volunteers often turn into advisory board members over time.

Events / Special Projects Committee

A Chapter President may sanction or establish special projects or activities over and above the regular agenda. Usually the chapter President appoints a special projects committee manager to direct such efforts.

Some goals of a special projects committee:

- starting a new Chapter in a nearby city
- idea exchange luncheons
- a bid to host a regional conference, or Association board meeting

Chapter Loans and Grants

The UXPA Board of Directors has instituted a program allowing a chapter to apply for a grant or loan to help fund special chapter programs or events. Details on how to apply for a grant or loan are given by the Regional Director.

Grants are awarded for merit, seed money, or financial recovery/special need. Loans may be awarded when a chapter has insufficient money to sponsor a fundraising activity, but anticipates enough revenue to repay the loan.

When the Association's annual operating budget is established, money is budgeted for the loans and grants program. A chapter may request any number of separate grants or loans, but the cumulative allocation to any one chapter cannot exceed \$1,000 (US) per year. Additionally, no grant can be authorized that anticipates or commits the Association to an annual, periodic, or otherwise repetitive allocation. If your Chapter is considering applying for a grant or loan, discuss your needs with your Regional Director early in your chapter year.

The board reviews each grant proposal in its own right. Approval or disapproval does not constitute precedent for subsequent proposals.

Loans are subject to less stringent requirements, but will not be authorized for any chapter with an existing loan balance.

A chapter applies for a loan or grant by submitting the **relevant, completed forms** to the Regional Director. The Regional Director brings the application before the Board of Directors at one of the two annual board meetings. The Regional Director or UXPA will notify the chapter President regarding the outcome of the request immediately after the close of the board meeting.

Within one year of receiving a grant, the chapter is obligated to submit a report to the Association, outlining the effects and benefits derived from the grant. The same type of report is required from a chapter when a loan is granted. These reports should be submitted to the Association through the Regional Director.

If a loan has been awarded, payment of any outstanding balance must be made to the Association at the time the one-year report is submitted to the Regional Director, or within 90 days following completion of the related project, whichever is earlier.

Encouraging Growth

If your Chapter has a fairly sizable concentration of members who live in an area somewhat remote from the bulk of the membership, the Chapter President could appoint a special projects committee to assess the potential for creating a chapter in that area.

The committee could then schedule a chapter meeting at the target location and offer an attractive program to spark interest. At the meeting they could announce the possibility of establishing a new UXPA Chapter

and solicit reactions. If there is sufficient interest, the Chapter officers and the committee would pledge their support and, before adjourning, identify potential leaders willing to follow up with the organizational process.

As an alternative, the special projects committee may search for ways to make meetings more convenient for outlying members, such as varying meeting locations to include that geographic region.