



**American Welding Society®**

# **AWS Manual of Operations For Sections and Divisions**

**Rev. 5-18-18**

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## **What is the American Welding Society**

The American Welding Society was organized in 1919 with Dr. Comfort A. Adams, Dean of the Harvard Engineering School, as its first president and founder.

On January 3, 1919, Dr. Adams called a meeting at which it was agreed to form the American Welding Society. At that meeting, the objectives were set forth and on March 27, 1919, were formally adopted as part of the AWS Constitution.

The objectives were simple: “To advance the science and art of welding in all its branches. To afford the members opportunity for the interchange of ideas with respect to improvements in the welding art, and for the discussion of all matters bearing upon the practice of the art of welding, and for publication of information thereon.”

Today, consistent with its constitutional provisions, the American Welding Society’s role is to be the recognized authority on welding and related technology by dissemination of information and educational activities.

The seven specific missions of the Society are as follows:

1. Provide guidance and services to our members, to all of the individuals and organizations comprising the welding community, and to the general public.
2. Serve as the voluntary consensus standard developing body for codes, standards, specifications and recommended practices.
3. Provide for career development and training opportunities through conferences, seminars, courses and other educational resources.
4. Provide for technology transfer through publications, meetings, discussions, exhibitions, data banks and other means.
5. Promote and encourage welding research, and the application of such research, primarily through cooperative efforts with others (societies, associations, government agencies, universities and research centers).
6. Promote and encourage continued improvement in the reliability of welded products through personnel certification programs and other means.
7. Promote and encourage cooperation, exchange of information and research within the international welding community through participation in other national and international organizations and activities related to welding, welding research, welding standard preparation and welding technology transfer.

## **Education**

Having within its membership most of the outstanding professionals in its field, the American Welding Society has a major responsibility to advance welding and joining science and engineering. It is the responsibility of the AWS Education and Conferences & Seminar Departments to:

- Upgrade education and usefulness of individuals engaged in welding by offering educational programs in welding and joining science and technology, codes, and standards.
- Inform its members of new technologies, materials, and methods.
- Promote high standards in instruction of welding and joining science and technology.
- Lead Educators and Students to the many valuable scholarships available for continuing education.

The strategy to attain these objectives is to:

- Develop educational courses covering fundamental knowledge of welding.
- Develop topical conferences aimed at the state-of-the-art technology of problem areas.
- Develop programs to prepare welding personnel for the different certifications offered by AWS.
- Develop professional courses through the appropriate committees.
- Organize courses for companies to offer in-house.
- Develop a five-year plan to be updated annually which reflects the anticipated needs of the welding industry, economic conditions, and available resources. This will be the basis for formulating long-range goals.

The Departments are staffed with experienced and trained individuals in academia to develop and execute conference, seminar and clinic programs to reach these objectives.

## **Technical Services**

### **Codes, Standards, Specifications, and books on welding.**

AWS, through its codes, standards, specifications, recommended practices, and books on welding, advances the proper use of welding. These standards are correlations of reliable research and industrial data formulated by outstanding authorities from all phases of industry and government. They encompass welding fundamentals, symbols, testing, definitions, filler metals, training, inspection quality control, processes, qualification and certification of welding procedures and personnel, and industrial applications. Publications are available to members at reduced prices. A catalog is available upon request.

The AWS Technical Department employs a staff of engineers to provide limited technical services to members in solving their day-to-day welding problems. A listing of available consultants for welding engineering or plant welding problems is available on the AWS website.

### **Technical Committees**

The Society's technical committees number over one hundred committees and subcommittees consisting of well over nine hundred industrial, educational engineering and scientific authorities. This phase of the Society's activities is planned to provide maximum assistance to the welding industry.

The work of these committees consists of compiling basic information covering welding and allied processes, testing, inspection and production control as applied in different industries, the preparation of codes and specifications on filler metals, design, workmanship and inspection for vessels, piping and other construction; and assisting the Society's members in finding the answers to questions arising out of production problems, research investigations and the like.

Qualified individuals, primarily AWS members, are cordially invited to serve on the various AWS technical committees, including code writing bodies, thereby providing greater opportunity for advancement through working with experts in each field. The technical knowledge gained by working on these committees is the surest road to growth and advancement.

### **Cooperation with Other Organizations and Countries**

#### **Welding Research Council**

The Society, through the Welding Research Council of the Engineering Foundation, has provided an organizational machine for making available the leading private and governmental laboratories. This council is sponsored by the American Welding Society, American Civil Engineers, ASM International, American Society of Mechanical Electrical and Electronic Engineers, and the Society of Naval Architects, and Marine Engineers.

#### **International Institute of Welding**

AWS serves as Secretariat for the American Council of the International Institute of Welding. Through this body, AWS participates in the IIW and has active delegations on its sixteen Commissions which collect, coordinate, and disseminate information and recommendations covering world-wide use of welding and allied processes.

The Society appoints qualified members to represent the U.S. at meetings of the International Organization for Standardization (ISO) Committee on Welding. It also acts as technical advisor to the American representation on the International Electrotechnical Commission's Committee on Welding.

In addition, AWS acts as the U.S. distributing agent for many international publications on welding. The AWS Member, therefore, has an almost inexhaustible store of knowledge available upon request.

## **Service to the Industry**

The participation of industry and industry personnel in AWS activities will result in increased and more economical use of welding and allied processes, improved welding engineering, and therefore, a better and less costly product. For those engaged in the merchandising of welding products, machines, apparatus or supplies, AWS Section activity within their area is indispensable. Additionally, Sections should recognize and utilize the ever growing impact domestically of welding equipment / filler materials / cryogenic gases suppliers and the impact these entities have on the welding industry. To all who participate, Section activities can provide continual updating of knowledge, the sharing of valuable information and the opportunity of meeting important contacts in all branches of the field from welding instruction, research and consultation, the manufacture and distribution of equipment, to the actual application of techniques and inspection.

On the national level, there are over 160 technical, safety and health, educational and various publication committees and task forces, as well as the governing councils and the Board of Directors. Participation means that your voice, your ideas and opinions, and your experiences can have a direct influence in building the future.

## **Professional Status**

Members direct the affairs of the Society; they elect officers and have a headquarters staff to carry out their wishes – which opens up a whole new field of opportunity.

Today, the Society is recognized as the leading scientific organization in the world devoted to the advancement and interest of welding and allied processes. Among its members are found the world's leaders in education, government, and industry dealing with the art and science of welding. Welding, materials joining, civil, mechanical, electrical and chemical engineers, physicists and metallurgists will be found in its technical roster. Presidents and vice-presidents in charge of engineering, of production and control are in its management group. Deans, directors, doctors of science, and professors are prominent in many of its research and educational activities. AWS includes welders, inspectors, technicians and educators of all levels, as well as thousands of students who promise to be its life-blood of tomorrow. As a member of the American Welding Society, the accumulated knowledge of close to a century in welding research is available.

## **Welding Handbook**

The Welding Handbook is published in several volumes that cover fundamentals of welding, gas, arc and resistance welding processes, as well as other metal joining and cutting processes, metals and their weldability, and applications of welding. Volumes of the Welding Handbook are revised tri-annually. The most recently published volume of the Welding Handbook is made available to those who join as Individual Members for a minimal fee. Past volumes of the Handbook are available to all classifications of membership at a special reduced price.

## **Welding Journal**

Recognized as the world's leading welding magazine, the *Welding Journal* contains articles on all welding, cutting, and related processes and their applications, new products, news of the industry and activities of AWS. Included in the *Journal* is the Welding Research Supplement containing reports of research work being conducted in leading universities and industrial laboratories. The monthly issues, a benefit to all Members, contain an encyclopedia of engineering and metallurgical knowledge in the field of welding.

*Inspection Trends*, the magazine for materials inspection and testing personnel is published quarterly and received by those certified by AWS.

## **Annual Meetings & Expositions**

An annual Meeting is held each year in metropolitan centers. These meetings provide an opportunity for AWS members to present and hear the latest papers on developments in the welding industry. AWS promotes its members' participation in formal discussions and seminars. These national meetings enable members to meet and exchange views with top engineers, arrange plant tours and take part in social events.

The AWS Welding Show, held in conjunction with FABTECH, is among the top industrial shows in the U.S. It is held yearly, concurrent with the Annual Meeting, and provides an opportunity to see the latest in welding equipment, processes and materials.

## **Certification Programs**

The AWS Certification Program continues to grow. Each year more than 120 CWI scheduled exams are offered in cities across the U.S. and abroad. Currently there are nearly 40,000 individuals holding active CWI (Certified Welding Inspector) status.

Other certificates available from AWS include Senior Certified Welding Inspector (SCWI), Certified Welding Educator (CWE), Certified Welder (CW) Certified Welding Fabricator (CWF), Accredited Test Facility (ATF), NDE Radiographic Interpreter (RI), Certified Welding Engineer (CWEng) and Entry, Advanced and Expert-level Welder (S.E.N.S.E.). In addition, new programs continue to be developed by the AWS Certification Committee and staff.

The Certified Welders National Registry is a program designed to allow welders to complete a series of standardized skills tests administered by and independent third party. Records of successful applicants will be maintained by AWS in a nationwide welder registry, enabling employers to verify welder's qualifications.



## **AWS Board of Directors**

AWS is a volunteer led organization, managed by a Board of Directors composed of thirty-five individuals as indicated below:

- Twenty-two District Directors elected by the local membership of each respective District for a three-year term of office. District Directors are nominated by their District Nominating Committee.
- One President elected by the AWS membership each year for a one-year term of office. The President is nominated the National Nominating Committee.
- Three Vice-Presidents elected by the AWS membership each year for a one-year term of office. Vice-Presidents are nominated by the National Nominating Committee.
- Six Directors-at-Large elected by the AWS membership for a three-year term of office. Two Directors-at-Large are elected per year. Directors-at-Large are nominated by the National Nominating Committee.
- One Treasurer elected by the AWS membership for a three-year term of office. The National Nominating Committee nominates the Treasurer.
- Two Past-Presidents for a one-year term. The immediate Past President automatically fills one of these offices and the other Past-President is appointed by the President-elect with approval of the incoming Board of Directors.

Total: 35 members

Qualification and responsibilities of these individuals are given in Article IV and Article V of the AWS Bylaws. The Board of Directors authority for the management of the Society is provided in Article IV of the AWS Constitution.

**Approved Policy Relating to Surveys Conducted**  
**Using the American Welding Society Name**

1. This policy relates to any survey that is conducted by any American Welding Society (AWS) Section or other group employing, displaying, or otherwise indicating that the survey relates to the activities of the American Welding Society.
2. A survey is defined as an information gathering activity conducted by mail, personal interview, telephone, or any other method of communication, except normal AWS activities.
3. All surveys conducted which represent AWS or lead the surveyor to believe the survey is being conducted by AWS or for the benefit of AWS or approved by the AWS shall be authorized by the Executive Director and President.
4. Upon completion of any survey approved by AWS, the results of such survey shall be reported to the President and Executive Director of the Society.
5. Surveys relating to a Section's local meeting activities are exempt from the requirements of this policy, (meeting time, night, program, etc.) but are subject to Section Officer approval.
6. All Directors-at-Large, District Directors in Districts involved, and Chairmen of all Sections within or adjacent to the area involved in the survey shall be notified prior to the start of any contacts and survey of the following:
  - Organization involved, i.e., AWS Section, AWS office, AWS ES Committee, Joe Doe Welding Shop.
  - Purpose and/or content.
  - Scope (copy of survey or script).
  - Description of persons to be surveyed (random selection, Section membership, etc. be specific).
  - Time span of survey (starting date, duration, report date).
  - Is survey commercial or commercially involved?
  - What organization is bearing the cost of the survey, or is it on a voluntary basis?
  - Is cooperation and/or assistance of Section Officers, Directors, etc. desired, needed, or requested?

## **Authority to Speak or Act for the American Welding Society**

Only those persons who have been authorized to speak for, or act on behalf of, the American Welding Society, in accordance with the Society Bylaws, Board of Directors Rules, or the Rules of Operation of AWS Committees, may so speak or act and shall so speak or act only with respect to those matters on which they have been authorized to speak or act.

No person not authorized to speak for or act on behalf of the Society shall represent or hold himself out to any other person as possessing or exercising, whether expressly or implicitly, such authority.

No person shall have the authority to bind the Society, either orally or in writing, without the prior (written) approval of the Board of Directors.

In the area of Codes and Standards development and Codes and Standards interpretation, the Society shall conform to all mandatory Government Standards, American National Standards Institute, and current AWS rules as approved by the Board of Directors.

In keeping with the above policy, the Board of Directors requests a disclaimer statement be made by AWS members and members of AWS committees when speaking or writing to individuals or groups, to prevent any chance of statements being mistaken as representing those of the American Welding Society. A recommended disclaimer for such purposes is “The opinions and statements I express are my own and do not represent those of the American Welding Society.”

## **Policy for American Welding Society** **Written Communications**

In view of recent court decisions imposing full responsibility for the actions and conduct of the members, it is extremely important that all communications, including those to persons or organizations who are not members of the Society, accurately reflect Society policy. Failure to comply with the following requirements and procedures may result in termination of membership in the American Welding Society as provided in Article I, Section 3 (d) or the Bylaws.

### **Use of Society Stationery**

Society stationery should be used only for authorized Society activities and for normal communications among the members of the Society. Any communications dealing with Society policy, or the interpretations of codes or standards adopted by the Society, should first be sent to National for review and approval by an appropriate Officer of the Society or an authorized member of the Staff.

### **Use of Society Titles or Offices**

Any correspondence signed by an Officer, Director, Committee Chairman, Committee Member, Section Officer, or Staff Member should be considered as an official communication from the Society and should be consistent with the policies and positions of the Society. This does not in any way prevent or inhibit an expression of personal views or dissenting viewpoints on matters being considered within the Society. Extreme care must be exercised to be sure that such views are being expressed as those of the writer rather than as official positions of the Society.

### **Communications Intended for Publication or Dissemination**

Any communication that is submitted or intended for publication or dissemination that purports to represent the official position of the Society, or which could be interpreted to reflect the official policy or position of the Society, must first be submitted to National and approved by an appropriate Officer of the Society.

### **Policy on Replies to Inquiries Related to Interpretation of Standards**

Official AWS interpretations shall be made:

- Only with the concurrence of the relevant Technical Committee(s)
- Only by someone who does not have a conflict of interest with the inquirer or his/her employer, even if he/she would normally draft the reply as Chairman of the Committee.
- Through the AWS Staff person representing the cognizant Committee.

Respondents are not authorized to speak or write on behalf of the American Welding Society except as defined in this policy statement, and may not use official AWS stationery or logo without written permission of the AWS Board of Directors.

Requests for interpretation of AWS standards shall be reduced to writing. No oral interpretation shall be given. The *Welding Journal* shall regularly publish such inquiries and the written answers given to them.

If any oral opinions are given, the replier shall make it clear that he/she is giving his/her personal opinion and not the official interpretation of the Society.

AWS does not and will not endorse any specific brand of product.

By issuance of any publication, the American Welding Society does not assume any liability for its use. Each prospective user should make an independent investigation of a publication before applying it to this work. This should be made clear in all publications and in replies to inquiries.

## General Section Information

### Section Operations

AWS Sections hold from three to ten meetings annually. Technical programs are comprised of illustrated lectures by recognized authorities on welding applications, processes, procedures, apparatus, equipment, materials, design, fabrication, inspection and quality control.

In addition to regular monthly meetings, generally September to May, many Sections hold educational lectures and courses, arrange industrial and educational inspection trips and other events of general interest. Frequently, several Sections merge their efforts and hold regional conferences. Some arrange joint meetings with other engineering societies. Many reserve one meeting a month to focus on students. The Section meeting provides an excellent opportunity for hearing, discussing and presenting welding papers of direct interest to you as a member, for the interchange of ideas to aid in solving your welding problems, and is a useful vehicle for forming valuable local contacts in the industry.

Participation in AWS Section activities can be enjoyable, educational and profitable in experiences gained and business acquaintances acquired. There are AWS Sections in nearly every industrial center in the United States, and many more are in the process of being activated through the efforts of interested members.

Many AWS Sections conduct a least one social or recreational activity each year. Members may join in picnics, tournaments, dances, cruises and other entertainment. Many lasting friendships are formed because of common interests and experiences shared.

### Annual Reports

The Society Bylaws require that each Section prepare and submit an Annual Report, covering the fiscal year June 1 to May 31, to National. This report should be received at National by **July 1**. Part I of the Annual Report is sent to the Section Secretary the first week in April, and Part II, the financial statement, is sent to the Section Treasurer the first week in May. The original copy should be mailed to National, second copy to the District Director, and the third copy retained for the Section files.

Under existing regulations, banks and corporations paying interest or dividends are required to report such payments to the Commissioner of Internal Revenue using an official number for the recipient of such payments. If your Section receives such payments you should provide the number "13-0434890-N" to the bank or organization making the payment. Sections should not submit any report to the Collector of Internal Revenue. The report of all Sections is covered in the consolidated report submitted by the Society. The Annual Report is an **AWS Bylaws requirement**. Your Section will not be entitled to receive its Anniversary Payment unless this report is received at National by July 1. The annual Section rebate will be reduced by 25 percent if the Annual Report is received after July 1, and by 75 percent if received after September 15. It is the duty of the Section Chairman to be certain that the report is completed and mailed as indicated.

## **Submission of Meeting Reports for Publication** **In the Welding Journal**

Report Section meetings using the Section Meeting/Event Report form. Include date of meeting, speaker's full name, his or her title, company affiliation, and a summary of the talk. The Report form is located in the Section Tool Kit, under Forms and Templates.

### **Reporting Section News for Publication in the *Welding Journal***

**Use the *Section Meeting/Event Report* form to report your news.**

E-mail the completed form with any digital photos attached to Cindy Weihl at [cweihl@aws.org](mailto:cweihl@aws.org) with a copy to your District Director. Or mail to:

Welding Journal Dept.  
8669 NW 36th St., #130  
Miami, FL 33166-6672

You should receive a prompt reply to every e-mail you send to the Journal. If you do not, please call (800/305) 443-9353, ext. 244.

**Report Writing Tip:** Review reports published in back issues of Section News for ideas. Be sure to name everyone who receives an award. Identify the meeting place and city, names of tour guides, Section activities, etc. Write a complete caption for each photo attached with the names listed from left to right to clearly identify everyone.

#### **Photo Tips:**

Study photos published in back issues of Section News to get ideas on how to pose people.

Ask people to pose for each photo rather than take impromptu shots "on the fly."

Ask the Chair to schedule "Photo Op" on the meeting agenda so people will be prepared.

Subjects of interest include group shots, presentation of speaker gifts, golf outings, contest winners, students' and ladies' nights, election of officers, picnic groups, tour groups, welding contests, etc.

When two or more people are recognized at a meeting, pose all of them together for a group shot. Move the camera close to the people. Photos taken from a distance often lack detail and proper lighting. Never pose people in the light from a slide projector that makes images appear on their clothing and skin. A tip from the pros: Mount the camera on a tripod for sharpest images, and take several shots of each scene to select the best posed and exposed shot for publication.

If you are unsure about a photo, just send it in and we'll let you know how it works for us.

E-mail each photo as a separate JPEG file with the meeting report. Large, well-exposed photo files publish best. Aim for file sizes greater than 1 megabyte. Do not send photos embedded in Word documents or newsletters as they cannot be published.

#### **Publishing Schedule:**

Section reports and photos received on or before the 20<sup>th</sup> of the month will appear in the *Welding Journal* issue mailed about five weeks later. Example: Reports received by noon April 20 will appear in the June issue. Reports received April 21 will appear in the July issue.

Important: Should your meeting notice not appear in the expected issue of *Welding Journal*, please e-mail [cweihl@aws.org](mailto:cweihl@aws.org) or call (800/305) 443-9353, ext. 256.

### **Special Events**

Sections desiring special announcements or advance publicity for educational programs or other activities should send the necessary information to National about 75 days before the event to ensure that it appears in the *Welding Journal* for at least a month before the event.

### **Contact**

If you have any questions about providing information or pictures for the Section News, contact the Society News Editor, at (305) 443-9353.

## **Awards - Section/District**

Procedures regarding specific awards are available online in the Section Tool Kit. For a listing of Section Awards, see the information listed in the Awards Committee Chairman section in this manual.

## **Section Boundaries**

### **New Section Boundaries**

When a new Section is formed, the boundaries are proposed by the new Section, working in conjunction with the District Director. Boundaries are to be determined by county lines. If the boundary proposal does not affect the boundaries of any other Sections or Districts, the proposal is to be submitted to Member Services at AWS Headquarters for inclusion on the next Districts Council agenda for approval. If the proposal affects the boundaries of adjacent Sections or Districts, the instructions given below on changing Section boundaries should be followed.

### **Section Boundary Changes**

Sections initially recommend changes to the boundaries of their Section, working in conjunction with neighboring Sections. When all Sections involved concur with the proposal and all boundary changes are within one District, these changes are then passed on the District Director for review and concurrence. If the proposed changes intersect District boundaries, then the District Directors of the affected Districts must work together to achieve concurrence on the changes. When the District Director(s) is (are) satisfied with the proposed changes, they are to be sent to Member Services at AWS Headquarters for inclusion on the next Districts Council agenda for approval.

Copies of approved boundaries for all AWS Sections are available from Member Services upon request.

## **District Conferences**

Each year District Conferences are scheduled from the end of April through mid-June to allow all Sections within that particular District to interact with each other, their District Director, and a representative from National. Section representatives to the Conference participate in idea sharing and discussions on various Section activities and events. They are also updated on National activities and new programs. Attendees also participate in the important task of selecting the District scholarship recipients from their area, recipients for the various District/Section awards, and the individuals who will represent their District at the annual Instructors Institute and Leadership Symposium events, both held at AWS HQ.. Sections will receive notification of the date and location of the Conference by the District Director and Host Section. Sections represented will be entitled to receive the following reimbursements from National, as applicable, for their participation:



## **District Conference Reimbursements**

### **Travel Reimbursement**

National reimburses travel expenses up to **two** (2) representatives per Section if those individuals travel a distance greater than 100 miles one way from their Section's home city to the site of the District Conference.

The amount shall be the city-to-city mileage as given in published atlases or road maps at the current IRS mileage allowance or airfare, whichever is less. Host Sections are not eligible for any mileage reimbursement.

Travel reimbursement forms must be completed, signed by the District Director, and returned to the Member Services Department for reimbursement. Customer copy of airline ticket must be attached if travel was made by air.

### **Host Section Reimbursement**

The Host Section will be reimbursed by National up to, but not to exceed, \$900 for actual expenses (Conference meeting room fee, if applicable; breakfast, lunch, and/or dinner for Conference attendees.)

*If expenses are paid by the host Section or District Director, a receipt(s) must be submitted to the Membership Department for reimbursement.*

### **Section Representative Rebate**

All Sections receive a Section Representative rebate of \$100 for the first representative \$50 for the second, and \$50 for the third, not to exceed \$200 per Section. This reimbursement will appear on the Section's Annual Rebate check (mailed first week in September).

For more information on District Conferences contact the Member Services Department.

## Section Officer Nominations

The success of the AWS Section operation depends mainly upon the caliber of its officers. The selection of the nominees for officer is the responsibility of the Section Nominating Committee.

Accordingly, this Committee is entrusted with the welfare of the Section. This Committee, during its deliberations, should never be influenced by other than the long-range welfare of the Section. It is the duty of the nominating Committee to choose the right individual with the required qualifications. All individuals nominated for Section Office must be Member of the Society. This is especially true in regards to the Chairman, Secretary, and Treasurer, but important for all other offices, as well. More frequently than not, when the Section falters or does not advance because of poor “chairman leadership” or inadequate “secretarial services” the basic fault is that of poor judgment on the part of the Section Nominating Committee in selecting the right individual for the job. Good potential officer material will be found in the ranks of both users and suppliers of welding equipment and supplies, in universities and schools, in administrative, production, engineering, technical and sales activities. Try not to perpetuate Section Officers in the same office year after year. Officers should change. New blood should be introduced regularly, as it brings in new ideas and keeps the Section alive.

The Section Nominating Committee should consist of at least three persons - a Chairman and two members - all appointed each year by the current Section Chairman with Executive Committee approval. The Chairman should be a past Section Chairman, or at least a past officer, one who is currently an active member, and knows which members are active and what their qualifications are for elected office. The other members do not need to be current officers. If possible, the Committee should be representative of a cross-section of local industry. The Section Nominating Committee, upon completion of its task and acceptance of its report, is subject to immediate discharge. This Committee should be appointed at least 90 days prior to the Section’s annual meeting.

It is suggested that the Section Nominating Committee report to the Section Secretary within 20 days of appointment, providing the names of the nominees that they have selected for the various elective offices next falling vacant, together with the written consent of the nominees included in the report.

Nominations for officers and members of the Executive Committee may be made by petition signed by not less than 10 members in good standing of the Section, the names of such nominees to be added to the ballot as “nominees by Petition.”

The names of the “Regular Nominees” and of the “Nominees by Petition,” if there be any, should be presented at a regularly called meeting and the Chairman declares the closing date for further nominations to be ten days thereafter.

## Summary of Section Status

District Directors are notified of the reporting status of Sections in their Districts through-out the reporting period. The personal contact and interaction between Directors and Sections is especially important for those Sections in danger of becoming inactive. Below is a summary of Section status from active Section through a Section being recommended for disbandment.

<b>Reporting Status</b>	<b>Reported To</b>	<b>Financial Status</b>	<b>Awards Status</b>	<b>Listing in WJ</b>	<b>Mailings</b>
<b>Non-Reporting</b> Non-submission of Annual Report(s) not post-marked by July 1	District Director	25% penalty on rebate check if received before 9-15	Section award nominations permitted		
<b>Delinquent</b> Non-submission of Annual Report(s) by 9-15	District Director & Districts Council	75% penalty upon submission	Section award nominations permitted		
<b>Inactive</b> Failure to submit Annual Report(s) in two consecutive years	Districts Council	No Annual Rebate	No awards until submission of report(s)	Inactive status reported in the January issue of the <i>Welding Journal</i>	
<b>Disbanded</b> Failure to submit Annual Report(s) in three consecutive years	Board of Directors  Designated as Disbanded by BOD at the recommendation of Districts Council	Assets assigned to Disbanded Sections shall be transferred to Society Headquarters		Disbanded status reported in the January issue of the <i>Welding Journal</i>	Section Members notified by mail of Disbanded status and assigned to nearest Section unless Member specifies a preference

1. **Delinquent** Sections are to be reported at the First Districts Council Meeting of the fiscal year.
2. Failure to submit Annual Report(s) in two consecutive years will result in the recommendation for **Inactive Status**
3. Failure to submit Annual Report(s) in three consecutive years will result in the recommendation for **Disbanded Status**.
  - Assets assigned to Disbanded Sections shall be transferred to Society Headquarters.
  - Section Members will be advised by mail of the Disbanded status of the Section and shall be assigned to the nearest active Section unless the Member selects a different Section.
4. Sections designated as Inactive or Disbanded shall be reported in the January issue of the *Welding Journal*.

## **Bylaws**

**The Section Bylaws Committee should consist of three individuals, a Chairman and two members. Appointments should be made by the Section Chairman, subject to approval by the Section's Executive Committee. This Committee need not be a continuous committee. It should be appointed when a new Section is organized or when the occasion requires bylaw revisions. It should be discharged when it has completed its assignment.**

**The Bylaws of the Section shall not be in conflict with the Constitution and Bylaws of the National Society nor with the rulings of the National Board of Directors.**

**A suggested set of approved Section bylaws for new Sections and for existing Sections who may wish to consider changes to reflect their growth over the years is provided in the following pages. New or revised Section Bylaws must be submitted to AWS National for inclusion in the Section's folder. Bylaws should be mailed to Member Services. Copies your current Section Bylaws are available upon request.**

# SUGGESTED BYLAWS FOR AWS SECTIONS

Revised 12-13-17

BYLAWS OF \_\_\_\_\_ SECTION OF THE  
AMERICAN WELDING SOCIETY, INC.

## ARTICLE I

### NAME

Section 1. The name of this organization shall be the \_\_\_\_\_ Section of the American Welding Society, Inc., hereinafter called the Section.

## ARTICLE II

### OBJECTS

Section 1. The objects of this Section shall conform to those of the American Welding Society, Inc., hereinafter called the Society. The objects of the Society shall be:

- (a) To encourage in the broadest and most liberal sense the advancement of welding;
- (b) To encourage and to conduct research, both basic and applied in all sciences as they relate to welding;
- (c) To improve the education and usefulness of personnel engaged in and associated with welding activities;
- (d) To engage in and assist others in the development of sound practices for the application of welding and related processes;
- (e) To disseminate welding knowledge through its publications, meetings, discussions, consultations, exhibits and by any other available means;

Thereby fostering public welfare and education, aiding in development of our country's industries and adding to the material prosperity and well-being of our people.

## ARTICLE III

### ORGANIZATION

Section 1. The organization of this Section shall be subject to the approval of the Society's Board of Directors.

Section 2. Not fewer than fifty (50) members or eligible paid applicants for membership in the Society, in either the sustaining or member grades may apply for authorization for the organization of a new Section.

Section 3. Requirements of an Active Section. To maintain an active status, the Section shall:

1. Hold at least three (3) meetings during the Section's membership year for purpose of presentation of appropriate papers and interchange of ideas and information. Where practical, this

Section shall promote inspection trips, educational lectures, and courses.

2. Have a total paid membership of twenty-five Members.
3. Submit annual reports to the Secretary of the Society in accordance with the Society Rules. Should the Section become inactive, the National Secretary shall report the fact to the national Board of Directors, which may disband the Section in accordance with the Rules of the Society.

Section 4. Should the Section be disbanded, the Section Treasurer shall return to the Society all of its remaining funds with suitable accounting for receipt and disbursement of funds. A disbanded Section may be reinstated by the National Board of Directors in accordance with the Rules of the Society.

#### **ARTICLE IV**

##### **MEMBERSHIP**

Section 1. All members of the American Welding Society, namely, Sustaining Members, Members, Transitional Members, Student Members, Retired Members, Honorary Members and Life Members, residing within the bounds of this Section except those who have joined another Section in accordance with the National Bylaws of the American Welding Society and all others who have chosen to join this Section shall be members of this Section.

Section 2. All Members other than Student Members of this Section who are in good standing shall have the right to vote and hold office.

Section 3. Eligibility for membership shall be in accordance with Article 1 Section 1 of the Bylaws of the Society.

#### **ARTICLE V**

##### **MEETINGS**

Section 1. Regular meetings of this Section shall be held at such time and place as determined by the Executive Committee.

Section 2. The annual meeting of this Section shall be held in the Month of (April or May<sup>\*</sup>) of each year for the election of Section Officers and Executive Committee for the coming year, and for the transaction of such other business as may require action by this Section's membership.

Section 3. The membership and fiscal year of this Section shall commence on June 1 and end on May 31.

#### **ARTICLE VI**

##### **MANAGEMENT**

Section 1. The Officers of this Section shall consist of a Chairman, a First and Second Vice Chairman, a Secretary and a Treasurer, all of whom shall be

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\* Select one month for annual meeting.

elected for a term of one year by the Section at the Charter Meeting and each annual meeting thereafter. It is suggested the Chairman, the First and Second Vice Chairman shall not be eligible for election to the same office for more than two terms in succession.

- Section 2. The management of this Section shall be vested in an Executive Committee consisting of the Officers of the Section, the immediate Past Chairman and (three or six) Members-at-Large<sup>\*\*</sup>.
- Section 3. At the Charter Meeting of this Section, one-third of the Members-at-Large of the Executive Committee shall be elected to serve for one year, one-third for two years, and one-third for three years. At each annual meeting thereafter, one-third shall be elected to serve for three years.
- Section 4. The Executive Committee shall have power to fill vacancies in its membership, such member to hold office for the unexpired term of the vacating member.
- Section 5. The Executive Committee may hold meetings, subject to the call of the Chairman, as frequently as the interests of this Section require.
- Section 6. At all meetings of the Executive Committee, a majority shall constitute a quorum. Any member of the Executive Committee not present for three consecutive meetings may be asked by the Chairman to vacate the position held.
- Section 7. Family members/relatives of the Section Treasurer may not serve as Chairman or other Officer.
- Section 8. Each Section must have at least two, preferably three, signatories for each financial account (checking, savings, CD, Section Investment Agreement with AWS National, etc.). The Executive Committee must insure that the Section's signatories are updated on all accounts when necessary.
- Section 9. All obligations of the Section will be paid by check, drawn to the Section's account.
- Checks should be signed by the Treasurer and at least one other Officer designated by the Executive Committee to have this authority.
  - Should it not be possible to acquire a second signature, Chair should be notified of disbursement and a confirmation via email should be attained and saved for record keeping.
  - Disbursements over \$1,000 require email notification and approval from all Officers.

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<sup>\*\*</sup> Specify a sufficient number to satisfy the requirements of this Section.

- No checks should be written to an officer without proper approval. As such, any payment made by personal credit card for Section-related activities must be approved by all officers prior to reimbursement.

Section 10. The Chairman of the Executive Committee may request an audit of the Section's books at any time. The outgoing Chairman and incoming Chairman shall audit the books at the end of the fiscal year and sign the same before making out the annual report, and at any time there is a change of Treasurer.

## ARTICLE VII

### DUTIES OF OFFICERS

Section 1. CHAIRMAN – The Chairman shall preside at all meetings of the Section and of its Executive Committee. He/she shall act as chief executive officer of this Section subject at all times to approval of the Executive Committee.

Section 2. FIRST VICE CHAIRMAN – The First Vice Chairman shall perform the duties of the Chairman in the event the Chairman is absent or unable to act. He/she may be designated to serve as Program Chairman of this Section.

Section 3. SECOND VICE CHAIRMAN – The Second Vice Chairman shall perform the duties of the Chairman in the event both the Chairman and First Vice Chairman are absent or unable to act. He/she may be designated to serve as Membership Chairman of this Section.

Section 4. SECRETARY – The Secretary shall keep minutes of all meetings of the Executive Committee. The Secretary shall keep an accurate record of all members of this Section and shall periodically check the roster with the records of the Society. This member shall be custodian of all papers and non-financial records of the Section and shall perform the usual duties of a recording and corresponding Secretary. The Secretary, or such person as designated, shall submit a report in writing of each meeting of the Section to the National Secretary of the Society (Section Meeting Report Form), with a copy to the District Director. The Secretary shall make an annual report to the National Secretary of the Society, with copy to the District Director. If absent these duties fall upon the other officers in the following order: Chairman, Treasurer, First Vice Chairman and Second Vice Chairman. Bring to the attention of the Chairman all correspondence, bulletins, notifications, and matters affecting the Section's activities as well as those which the Chairman should bring before the Executive Committee, under the direction of the Chairman. Arrange for and supervise the mailing of all Section meeting notices to all on the mailing lists of members, prospective members, approved organizations, District Directors, National Headquarters and other Section Secretaries as decided.



Section 5.

**TREASURER** – The Treasurer shall be the financial officer of the Section. He/she shall keep complete and accurate accounts of receipts and disbursements in books belonging to this Section, and shall deposit all funds of the Section in the name and to the credit of this Section, in such depository as may be designated by this Section’s Executive Committee. The Treasurer shall ensure there are at least two, preferably three, signatories listed on the Section’s financial account(s). The Treasurer shall provide an updated financial report at Section and Executive Committee meetings, and provide the Section Chairman periodic reports, as requested.

The Treasurer shall prepare a budget based on anticipated income and fixed expenses for submission to the Executive Committee at the first Executive Committee meeting of the Section’s fiscal year. The Treasurer shall disburse the funds of this Section as may be ordered by this Section’s Executive Committee, requiring receipt of proper vouchers for such disbursements. A requirement may be made by this Section’s Executive Committee to file a proper bond, conditioned upon the performing duties of this Section entrusted to him/her. Prepare annual report of receipts and expenditures prior to the end of the fiscal year and forward a copy of the report to the Secretary of the Society with copy to the District Director. The Treasurer prepares for each meeting of the Executive Committee a report on the financial status of the Section. Retain bank statements for a minimum of \_\_\_\_\_ years and a maximum of \_\_\_\_\_ years before disposing of them. (The statute of limitations varies according to state. Check regulations applicable in your state.) The main obligation of the Treasurer is to serve as custodian of all Section funds. To fulfill this obligation, the Treasurer must insist upon being made aware of every Section activity and be informed as to the possibility of its need for funds, the amount of such and the frequency. At no time should approval be given to the financing of projects if the Section’s welfare is not indicated. While overruled by the Chairman and Executive Committee, a valid objection must be made to the action taken, it is the duty of the treasurer, for the record, to insist upon registration of this negative vote in the minutes of the Executive Committee meeting. When it appears that the Section’s operations are consuming funds beyond those provided in the budget, it is the Treasurer’s obligation to bring this matter to the immediate attention of the Chairman, Secretary, and Executive Committee with recommendation that either certain operations be curtailed or additional ways and means be developed for proper financing.

**ARTICLE VIII**

**Treasurer’s  
Tutorial &  
Guidance 101**

**OVERVIEW**

These guidelines are designed to supplement the AWS Manual of Operations For Sections and Divisions and bring the best business practices for Sections’ Treasury operations. Each

Section should review, analyze and evaluate these guidelines and make necessary changes in its existing operations. The only mandatory requirements provided in the guidelines are located in the Annual Financial Report and Retention of Financial Records sections.

### **TREASURER ORIENTATION**

- Three months before transitioning of duties to a new Treasurer, provide a description of the official duties (See AWS Manual of Operations for Sections and Divisions) and follow-up to ensure clarity in understanding of the information.
- Two months before transition, summarize the tips for the new Treasurer based on your experience in the position and outline all the informal DOs and DON'Ts of being in the role.
- One month before transition, meet with the new Treasurer and the new Chairman to review your records and documents in details and go over the software utilized to record and report Section's finances.

These include:

- Bylaws
- archive of documents and receipts
- forms
- names of contacts from banks and vendors
- contracts with hotels
- computer software and online merchant accounts (Eventbrite, PayPal, etc)
- bank statements
- budgets
- other relevant financial and membership information

### **BANKING PROCEDURES**

#### **Opening / Closing of a Bank Account**

To open or close a bank account, a written request should be made to the Section's Executive Committee. The following information should be included in the request:

- Bank name, address, bank contact and phone number
- Purpose of the request
- Proposed account signatories

All requests to open or close a bank account should be approved by the Section's Executive Committee.

The Section Treasurer will process and retain all documentation related to the opening or closing of bank accounts. All changes should be reported to the Executive Board and recorded in the Section's meeting minutes.

#### **Account Signatories**

The Treasurer is responsible for ensuring that accounts are properly maintained and that signatories are correct and updated as necessary. This includes responsibility to ensure accounts are opened and closed as necessary including timely accounting for all related funds. For the bank accounts, the signatories should be the Treasurer and at least two other current officers of the Section. At the beginning of each Section year, the procedure of updating the signatories on each of the bank accounts should be performed as quickly as possible.

The Treasurer should identify each account and then contact each of the applicable banks to determine the best methods of updating signatories.

### **Additions / Deletions of Authorized Signatories**

All requests to add or delete bank signatories should be approved by the Section Treasurer and Chairman. All changes to authorized signatories should be reported to the Executive Committee and recorded in the Section meeting minutes. Upon receipt of an approved request, the Treasurer will notify the bank of signature changes and coordinate the effort to ensure the changes occur timely. The Treasurer will retain all documentation related to the addition and deletion of bank signatories.

### **Cash Receipts**

Receipts usually come in the following ways: 1. Checks and cash from members or sponsors  
2. Credit/Debit card payments received through merchant accounts (i.e. Eventbrite, PayPal) 3. Section rebate checks from American Welding Society Headquarters.

To ensure safeguarding of Section's assets, the following controls are recommended for implementation:

- A. Registration for events should be handled by a Section Member, preferably other than the Section Treasurer
- B. Event payments should be received by the Section Treasurer
- C. Cash payments should be deposited as soon as practical, preferably within three business day of the event.
- D. Electronic payments via Eventbrite, PayPal or other third party payment systems should be under the control of the Section Treasurer. Such payments should be transferred directly to the Section bank account
- E. The Treasurer is responsible for obtaining the cash receipts activity from any merchant accounts and posting the necessary transactions into the book of records (i.e. QuickBooks/Monthly Reconciliation)
- F. An officer or designee should reconcile actual receipts (credit card payments, cash, and checks) to the attendance records (hard copy or electronic sign-in sheets) for every paid event offered by the Section. This control is not recommended to be performed by the Treasurer to ensure proper segregation of duties.

### **Cash Disbursements**

Each Section should establish their own monetary disbursement limits, determine authorized approvers and the process to approve transactions supporting operations of the Section. This decision should be discussed and approved by all members of the Executive Board and documented in the Section's meeting minutes.

Each payment should be supported by an invoice or appropriate supporting document (check request form, quote, receipt, vendor contract, venue contract, etc.) and approved by the authorized approver. In case an approval is obtained verbally, as part of the Executive Meeting or other arrangement, a note specifying an approval should be made in the Executive Committee meeting minutes subsequently. Original hard/soft receipt copies should be obtained and retained by the Treasurer per the provision for records retention (see Retention of Organizational Records below).

The Treasurer makes payments in the following ways: 1. Manual check 2. Debit card 3. Online payments. If payment is made by a check, the Treasurer manually prepares the check for the

invoice amount, signs the check and mails it to the designated payee. Check stock should be maintained by the Treasurer and adequately safeguarded at all times. Debit card and Online payment receipts should be stored per the retention of the Organizational records guidance (see Retention of Organizational Records below).

**Recommended Cash Disbursement and Authorization Matrix:**

<b>Approver</b>	<b>Monetary Limit</b>
All Members of the Executive Board	Over \$1,000 or 50% of Section’s Cash Balance as of 1 <sup>st</sup> of the month subsequent to receipt of AWS rebate check.
Treasurer, Chairman and half of the Board Members	\$500 - 1000
Chairman, Treasurer, First Vice Chair or Secretary	Up to \$500

**PLANNING, REPORTING AND RECORD KEEPING**

**Annual Budget Procedures**

A budget is a plan of action. It represents a Section’s blueprint for the entire year, expressed in monetary terms. The budget results from the Board’s decisions as to the Section’s programs for the future. Thus, a Section should know what its goals are before it can prepare a budget. The following basic steps are recommended to prepare a well-conceived budget.

- A. Past performance is generally a good indicator of future performance; thus, budgets and financial statements from previous years are invaluable to establishing a realistic budget. Financial statements from previous years that compare the budgeted revenue with actual revenues and expenses, item by item, are similarly an indispensable budgeting aid. It also is helpful to review a year-to-date financial statement and compare it with the budget. Input from past Section program leaders and directors, as well as other Sections in a district, may also prove valuable.
- B. Prepare a list of objectives or goals for the upcoming year. Re-evaluate the relative priority of existing programs and include any new initiatives.
- C. Estimate the cost of each objective or goal on the list. For continuing programs, the previous year’s actual expenses and budget will be helpful in estimating these costs.
- D. Compare total expected income to the expense of achieving the Section’s objectives and goals. Where projected expenses exceed income, value judgments will have to be made. What programs are most important? What costs can be reduced? Can additional income be found?
- E. Submit the final proposed budget to the entire Board for review and approval. This should not be just a formality. The budget should be carefully presented and reviewed so that once approved, all Section leaders will be firmly committed to the resulting plan of action.

The most carefully thought-out budget will be of little value if it is not compared throughout the year with the actual results of Section operations. As such, the budget should be compared to actual financial statement figures monthly to monitor Section financial activities throughout the year. Properly used, the budget can provide a benchmark that will be an early warning to the Board that financial goals may not be met. A budget, to be effective, should be a working document that forms the basis for action. A budget should not be seen as a restrictive device, but a way of estimating and guiding the spending of Section resources.

The best-prepared budget serves little purpose if the Board is unwilling to take action once it becomes apparent that expenses are exceeding the budget or that income has not been as high as anticipated. The Board should be prepared to modify the Section's plans if it becomes clear that the budget cannot be met. Many budgets fail because the Board does not take aggressive, corrective action. In these instances, the Section's Board is not fulfilling its responsibilities and the budget is a meaningless formality.

Monthly comparison of the Section's budget to actual operating results can also be a very effective internal control. If deviations from the budget are carefully followed up by the Board, the likelihood of a misappropriation occurring without being detected quickly is considerably reduced. Every Board member should ask questions about any item that appears out of line either with the budget or with expected figures.

### **Bank Reconciliations**

One of the most important methods of financial control for a Section is a bank reconciliation of all Section bank accounts. Preparing a bank reconciliation involves reviewing the Section's checkbook balance and bank accounts' cash balances. Reconciliation is the primary method of double-checking the Section's handling of cash receipts and disbursements during the month and exposing any errors.

To facilitate collaboration between Sections and their Districts, as well as to provide accountability and transparency, Treasurers are encouraged to determine an optimal frequency of performing reconciliations of their financial operations with agreement and confirmation of their District Directors (monthly, quarterly etc). Once a frequency is determined, Treasurer should start submitting reconciliations along with the corresponding bank statements to District Director for a review.

### **Annual Financial Report**

The Section Annual Financial Reports, with required documentation (see below), should be submitted to the AWS Headquarters by the July 1 due date for the Sections to receive their Annual Rebates in September. Copies of these Reports should also be sent to the Section's District Director.

1. Annual Financial Report
2. 12 bank statements for the entire year
3. Self-Assertion Confirmation Form. The form is designed with intuitive PDF features and can be completed and signed without printing

**(A new form required to be submitted beginning 2018, see Self Assertion Form below)**

### **Retention of Organizational Records**

The Treasurer should maintain books and records to document transactions by Section year, which runs from June 1 through May 31. These records should be maintained in a neat, orderly fashion by year and type of receipt or expense. Examples of the types of books and records would include:

- Event attendance records
- Board meeting minutes
- Cash receipts and cash disbursements (including copies of checks issued, if not part of the bank statements)

- Records of cash disbursement approvals (if not part of the meeting minutes)
- Annual Financial Reports
- Bank Reconciliations

These records should be turned over to the succeeding Treasurer at the conclusion of each term of office. Records should be maintained in accordance with the following schedule:

- Retain cancelled checks should be stored for a minimum of three years and maximum of eight years before disposing of them.
- Section’s Bylaws and Annual Financial Reports are the key documents for any Section and therefore should be stored permanently.
- All other financial and operational records shall be maintained for current year plus a minimum of three years.

**Self Assertion Form**



Section  
Self-Assertion Confi

**ARTICLE IX**

**SECTION 501(c)(3)  
PROVISIONS FOR  
GOVERNING  
DOCUMENT**

- Section 1. The Section is organized, and shall be operated exclusively for, educational and charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, or corresponding section of any future tax code (the “Code”).
- Section 2. No part of the net earnings of the Section shall inure to the benefit of any officer or director of the Section, or any private individual (except that reasonable compensation may be paid for services rendered to or for the Section affecting one or more of its purpose(s)); and no director, officer or any private individual shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Section.
- Section 3. No substantial part of the activities of the Section shall be carrying on of propaganda, or otherwise attempting to influence legislation, and the Section shall not participate in, or intervene in (including the publication or distribution or statements) any political campaign on behalf of any candidate for public office.
- Section 4. The Section shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from taxation under Section 501(c)(3) of the Code, or by an organization, contributions to which are deductible under 170(c)(2) of the Code.

Section 5. Upon dissolution of the Section, after paying or providing for payment of any debts and other liabilities, all remaining assets of the Section shall be distributed to the American Welding Society provided that the American Welding Society is at such time exempt from federal income taxation under Section 501(c)(3) of the Code.

## **ARTICLE X**

### **ELECTIONS**

- Section 1. The Section Chairman shall appoint a Nominating Committee to consist of at least three members, one of whom he/she shall designate as Chairman, preferably the immediate Past Chairman. If available among those actively participating in Section activities, Past Chairmen should be appointed as Nominating Committee members. The Committee shall meet at least 90 days prior to this Section's annual meetings.
- Section 2. The Nominating Committee shall report to the Section Secretary within 20 days, the names of the nominees that they have selected for the various elective offices next falling vacant, together with (if necessary) the written consent of the nominees included in the report.
- Section 3. The nominees proposed by the Nominating Committee shall be designated as "Regular Nominees."
- Section 4. Nominations for officers and members of the Executive Committee may also be made by petition by not less than ten members in good standing of the Section, the names of such nominees to be added to the slate as "Nominees by Petition."
- Section 5. The names of the "Regular Nominees" and of the "Nominees by Petition," if there are any, shall be presented at a regularly called meeting and the Chairman shall declare the closing date for further nominations.
- Section 6. Members cast their votes in person at the annual meeting. The candidates receiving the largest number of votes for the respective offices shall be declared elected and shall assume office on adjournment of the annual meeting.
- Section 7. In case of a tie in the vote for any office, the Chairman shall cast the deciding vote, except in such case where he is involved in a tie vote, the most recent Past Chairman shall cast the deciding vote.
- Section 8. Provided there are no nominations by petition, and provided that the slate of "Regular Nominees" proposed by the Nominating Committee is mailed to all Members of the Section at least 45 days in advance of the annual meeting of the Section, election may be made by approval of a motion for the Secretary to cast a unanimous ballot for the election of those nominated.

## **ARTICLE XI**

### **INDEMNIFICATION**

Section 1. Any person named as a defendant or respondent in a third party legal proceeding by reason of the fact that such person is or was a director or officer of the Section, shall be indemnified and held harmless by the Section, though not in excess of the actual amount of the Section's available insurance coverage, against all costs, expenses, liabilities and losses (including reasonable attorneys' fees) reasonably incurred or suffered by such person in the defense of the legal proceeding, except in the event the officer or director received an improper personal benefit, engaged in willful misconduct, or other circumstances resulting in ineligibility for indemnification under applicable State law.

## **ARTICLE XII**

### **MISCELLANEOUS**

- Section 1. The Executive Committee is empowered to appoint committees for special purposes.
- Section 2. The Chairman shall be ex officio, a member of all committees.
- Section 3. Proposal for amendments to those Bylaws may be submitted in writing at any regular meeting of this Section and, if approved by a majority of the eligible voting members present at the meeting, shall be submitted to the full membership of the Section. If approved by two-thirds of the votes cast, the amendment or amendments shall become a part of the Bylaws provided they are not in conflict with the Constitution of the American Welding Society, Inc.
- Section 4. These Bylaws shall go into effect immediately upon their adoption by a vote of this Section, such adoption requiring at least a two-thirds vote of the Executive Committee, as long as the Bylaws are in agreement with the National Bylaws as adopted by the National Board of Directors.



## Section Officers

The following outline lists the various Section Officers and Committee Chairmen and explains how these positions are filled. The first five listed are the Officers, followed by Committee Chairmen (listed alphabetically by Committee).

- Chairman – elected by Section membership
- First Vice Chairman – elected by Section membership
- Second Vice Chairman – elected by Section membership
- Secretary – elected by Section membership
- Treasurer – elected by Section membership
- Awards Committee Chairman – appointed by Chairman, confirmed by the Executive Committee
- Certification Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Education Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Image of Welding Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Membership Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Program Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Publicity Committee Chairman - appointed by Chairman, confirmed by the Executive Committee
- Roster Administrator - appointed by Chairman, confirmed by the Executive Committee
- Scholarship and Foundation Section Representative – appointed by Chairman, confirmed by the Executive Committee
- S.E.N.S.E. and Student Affairs Committee Chairman – appointed by Chairman, confirmed by the Executive Committee
- Student Member Liaison – appointed by Chairman, confirmed by the Executive Committee
- Technical Representative – appointed by Chairman, confirmed by the Executive Committee

## Section Executive Committee

It is suggested that the **Executive Committee** consist of the Section Chairman, First Vice Chairman, Second Vice Chairman, Secretary, Treasurer, the two immediate past Section/Chairmen, and three or more Members-at-Large. The Members-at-Large are voted onto this Committee whereas the other above mentioned Committee Members are automatically members due to their Office. By Section vote, the membership may decide to include a Standing Committee Chairman on the Executive Committee.

**The affairs of the Section are managed by the Section Executive Committee.** Generally, the duties of the Executive Committee are:

1. Manage the affairs of the Section, except as otherwise provided by law, or by the Section's Bylaws.
2. Purchase or otherwise acquire for the Section any property rights and privileges which the Section is authorized to acquire.
3. Approve appointments to Section Committees and proposed activities.
4. Determine who shall be authorized to sign on behalf of the Section, notes, receipts, acceptances, endorsements, checks, releases, any and all contracts and other documents, and to make such authorization. Ensure that there are least two, preferably three, signatories listed on the Section's bank account(s).
5. Family members/relatives of the Treasurer may not serve on the Executive Committee.
6. Perform such other acts as may be necessary to carry out the purpose of the Section and the Society.

In case of vacancy occurring on the Section Executive Committee through death, resignation, disqualification or other cause, the Executive Committee should appoint a successor to hold office for the unexpired portion of the term of the retiring member.

Members-at-large of the Executive Committee should never be changed completely. Each year only one-third or, at the most, one-half, should be retired. To accomplish this, one-half of the total should be nominated and elected for a two-year term, or one-third of the total for a three-year term. The immediate past Chairman should automatically serve either a one or two-year term. Members-at-large should not be eligible for re-election to the same office until at least one full term (two or three years, whichever is the rule) has elapsed after the end of their respective terms. The Chairman and Vice Chairman generally serve a one-year term and are eligible for re-election for an additional term. Some Sections may call upon the Secretary and Treasurer to serve in office for several years.

All members of the Executive Committee are entitled to vote. However, sound parliamentary procedure dictates that the Chairman should exercise his/her vote only when necessary to break a tie.

No official business should be conducted by the Executive Committee unless a quorum is present. The “quorum” refers to the number present, not the number voting. Unless the Bylaws provide otherwise, the quorum is the majority of the Committee’s members.

The Executive Committee is essentially the Section’s Board of Directors. The Section Chairman presides at all meetings of the Executive Committee. In the chairman’s absence, the duty falls upon the other Officers in the following order, namely, First Vice Chairman, Second Vice Chairman, Secretary and Treasurer. Meetings of the Executive Committee are best held monthly.

New Members-at-large may not be thoroughly familiar with many phases of operation. Accordingly, at the first meeting it is important to review the scope and objectives of the Society, both Section and National. It is advisable to provide all new Members-at-large with copies of the minutes of the previous three meetings of the Executive Committee so that they can familiarize themselves with the most recent business conducted and be prepared to act upon new business.

Minutes of Executive Committee meetings are typically recorded by the Secretary. Each member of the Committee should receive a copy of the minutes, approved by the Chairman, as soon after the meeting as possible, and at least ten days prior to the convening of the next meeting.

A Section will be successful in direct proportion to the interest invested in all of its activities by the Executive Committee members, who should hold frequent meetings and give adequate attention to the efforts of each of the sub-committees. The obligation of the Executive Committee member does not begin and cease with attendance at the Committee’s meetings. Members should promote the Society, the Section, and their objectives to all industry representatives when regular business activities permit it.

A Section may allow an interested group in its general area to form a Division. Such a group should have an enrollment of at least 25 interested members before the Section’s Executive Committee gives permission to the group to function as a Division of the Section. In instances of this type, it is required that such request receive approval from the National Board of Directors prior to providing official sanction to operate in this capacity.

The Executive Committee should (a) extend a standing invitation to their District Director to attend all Section meetings, (b) instruct the Section’s Secretary to send notices in advance to the District Director regarding each forthcoming meeting, (c) send the District Director copies of the minutes of each meeting of the Executive Committee and (d) send a copy of the monthly meeting write-up (form provided by the AWS National for publication in the *Welding Journal*) to the District Director.

The Executive Committee is a policy making board. It should not attempt to handle details. It should invite the various Section Standing Committee Chairmen to its meetings, if they are do not already serve on the Executive Committee, to discuss and report upon their activities. When a problem arises which cannot be assigned to an existing committee, a special committee should be appointed, with scope for studying and reporting its recommendations to the Executive Committee at a subsequent meeting.

## **Treasurers Tutorial and Guidance 101**

### **OVERVIEW**

These guidelines are designed to supplement the AWS Manual of Operations For Sections and Divisions and bring the best business practices for Sections' Treasury operations. Each Section should review, analyze and evaluate these guidelines and make necessary changes in its existing operations. The only mandatory requirements provided in the guidelines are located in the Annual Financial Report and Retention of Financial Records sections.

### **TREASURER ORIENTATION**

- Three months before transitioning of duties to a new Treasurer, provide a description of the official duties (See AWS Manual of Operations for Sections and Divisions) and follow-up to ensure clarity in understanding of the information.
- Two months before transition, summarize the tips for the new Treasurer based on your experience in the position and outline all the informal DOs and DON'Ts of being in the role.
- One month before transition, meet with the new Treasurer and the new Chairman to review your records and documents in details and go over the software utilized to record and report Section's finances.

These include:

- Bylaws
- archive of documents and receipts
- forms
- names of contacts from banks and vendors
- contracts with hotels
- computer software and online merchant accounts (Eventbrite, PayPal, etc)
- bank statements
- budgets
- other relevant financial and membership information

### **BANKING PROCEDURES**

#### **Opening / Closing of a Bank Account**

To open or close a bank account, a written request should be made to the Section's Executive Committee. The following information should be included in the request:

- Bank name, address, bank contact and phone number
- Purpose of the request
- Proposed account signatories

All requests to open or close a bank account should be approved by the Section's Executive Committee.

The Section Treasurer will process and retain all documentation related to the opening or closing of bank accounts. All changes should be reported to the Executive Board and recorded in the Section's meeting minutes.

#### **Account Signatories**

The Treasurer is responsible for ensuring that accounts are properly maintained and that signatories are correct and updated as necessary. This includes responsibility to ensure accounts are opened and closed as necessary including timely accounting for all related funds. For the bank accounts, the signatories should be the Treasurer and at least two other current officers of

the Section. At the beginning of each Section year, the procedure of updating the signatories on each of the bank accounts should be performed as quickly as possible.

The Treasurer should identify each account and then contact each of the applicable banks to determine the best methods of updating signatories.

### **Additions / Deletions of Authorized Signatories**

All requests to add or delete bank signatories should be approved by the Section Treasurer and Chairman. All changes to authorized signatories should be reported to the Executive Committee and recorded in the Section meeting minutes. Upon receipt of an approved request, the Treasurer will notify the bank of signature changes and coordinate the effort to ensure the changes occur timely. The Treasurer will retain all documentation related to the addition and deletion of bank signatories.

### **Cash Receipts**

Receipts usually come in the following ways: 1. Checks and cash from members or sponsors  
2. Credit/Debit card payments received through merchant accounts (i.e. Eventbrite, PayPal) 3. Section rebate checks from American Welding Society Headquarters.

To ensure safeguarding of Section's assets, the following controls are recommended for implementation:

G. Registration for events should be handled by a Section Member, preferably other than the Section Treasurer

H. Event payments should be received by the Section Treasurer

I. Cash payments should be deposited as soon as practical, preferably within three business day of the event.

J. Electronic payments via Eventbrite, PayPal or other third party payment systems should be under the control of the Section Treasurer. Such payments should be transferred directly to the Section bank account

K. The Treasurer is responsible for obtaining the cash receipts activity from any merchant accounts and posting the necessary transactions into the book of records (i.e. QuickBooks/Monthly Reconciliation)

L. An officer or designee should reconcile actual receipts (credit card payments, cash, and checks) to the attendance records (hard copy or electronic sign-in sheets) for every paid event offered by the Section. This control is not recommended to be performed by the Treasurer to ensure proper segregation of duties.

### **Cash Disbursements**

Each Section should establish their own monetary disbursement limits, determine authorized approvers and the process to approve transactions supporting operations of the Section. This decision should be discussed and approved by all members of the Executive Board and documented in the Section's meeting minutes.

Each payment should be supported by an invoice or appropriate supporting document (check request form, quote, receipt, vendor contract, venue contract, etc.) and approved by the authorized approver. In case an approval is obtained verbally, as part of the Executive Meeting or other arrangement, a note specifying an approval should be made in the Executive Committee meeting minutes subsequently. Original hard/soft receipt copies should be obtained and retained

by the Treasurer per the provision for records retention (see Retention of Organizational Records below).

The Treasurer makes payments in the following ways: 1. Manual check 2. Debit card 3. Online payments. If payment is made by a check, the Treasurer manually prepares the check for the invoice amount, signs the check and mails it to the designated payee. Check stock should be maintained by the Treasurer and adequately safeguarded at all times. Debit card and Online payment receipts should be stored per the retention of the Organizational records guidance (see Retention of Organizational Records below).

**Recommended Cash Disbursement and Authorization Matrix:**

Approver	Monetary Limit
All Members of the Executive Board	Over \$1,000 or 50% of Section’s Cash Balance as of 1 <sup>st</sup> of the month subsequent to receipt of AWS rebate check.
Treasurer, Chairman and half of the Board Members	\$500 - 1000
Chairman, Treasurer, First Vice Chair or Secretary	Up to \$500

**PLANNING, REPORTING AND RECORD KEEPING**

**Annual Budget Procedures**

A budget is a plan of action. It represents a Section’s blueprint for the entire year, expressed in monetary terms. The budget results from the Board’s decisions as to the Section’s programs for the future. Thus, a Section should know what its goals are before it can prepare a budget. The following basic steps are recommended to prepare a well-conceived budget.

- F. Past performance is generally a good indicator of future performance; thus, budgets and financial statements from previous years are invaluable to establishing a realistic budget. Financial statements from previous years that compare the budgeted revenue with actual revenues and expenses, item by item, are similarly an indispensable budgeting aid. It also is helpful to review a year-to-date financial statement and compare it with the budget. Input from past Section program leaders and directors, as well as other Sections in a district, may also prove valuable.
- G. Prepare a list of objectives or goals for the upcoming year. Re-evaluate the relative priority of existing programs and include any new initiatives.
- H. Estimate the cost of each objective or goal on the list. For continuing programs, the previous year’s actual expenses and budget will be helpful in estimating these costs.
- I. Compare total expected income to the expense of achieving the Section’s objectives and goals. Where projected expenses exceed income, value judgments will have to be made. What programs are most important? What costs can be reduced? Can additional income be found?
- J. Submit the final proposed budget to the entire Board for review and approval. This should not be just a formality. The budget should be carefully presented and reviewed so that once approved, all Section leaders will be firmly committed to the resulting plan of action.

The most carefully thought-out budget will be of little value if it is not compared throughout the year with the actual results of Section operations. As such, the budget should be compared to actual financial statement figures monthly to monitor Section financial activities throughout the

year. Properly used, the budget can provide a benchmark that will be an early warning to the Board that financial goals may not be met. A budget, to be effective, should be a working document that forms the basis for action. A budget should not be seen as a restrictive device, but a way of estimating and guiding the spending of Section resources.

The best-prepared budget serves little purpose if the Board is unwilling to take action once it becomes apparent that expenses are exceeding the budget or that income has not been as high as anticipated. The Board should be prepared to modify the Section's plans if it becomes clear that the budget cannot be met. Many budgets fail because the Board does not take aggressive, corrective action. In these instances, the Section's Board is not fulfilling its responsibilities and the budget is a meaningless formality.

Monthly comparison of the Section's budget to actual operating results can also be a very effective internal control. If deviations from the budget are carefully followed up by the Board, the likelihood of a misappropriation occurring without being detected quickly is considerably reduced. Every Board member should ask questions about any item that appears out of line either with the budget or with expected figures.

### **Bank Reconciliations**

One of the most important methods of financial control for a Section is a bank reconciliation of all Section bank accounts. Preparing a bank reconciliation involves reviewing the Section's checkbook balance and bank accounts' cash balances. Reconciliation is the primary method of double-checking the Section's handling of cash receipts and disbursements during the month and exposing any errors.

To facilitate collaboration between Sections and their Districts, as well as to provide accountability and transparency, Treasurers are encouraged to determine an optimal frequency of performing reconciliations of their financial operations with agreement and confirmation of their District Directors (monthly, quarterly etc). Once a frequency is determined, Treasurer should start submitting reconciliations along with the corresponding bank statements to District Director for a review.

### **Annual Financial Report**

The Section Annual Financial Reports, with required documentation (see below), should be submitted to the AWS Headquarters by the July 1 due date for the Sections to receive their Annual Rebates in September. Copies of these Reports should also be sent to the Section's District Director.

3. Annual Financial Report
4. 12 bank statements for the entire year
3. Self-Assertion Confirmation Form. The form is designed with intuitive PDF features and can be completed and signed without printing

**(A new form required to be submitted beginning 2018, see Self Assertion Form below)**

### **Retention of Organizational Records**

The Treasurer should maintain books and records to document transactions by Section year, which runs from June 1 through May 31. These records should be maintained in a neat, orderly

fashion by year and type of receipt or expense. Examples of the types of books and records would include:

- Event attendance records
- Board meeting minutes
- Cash receipts and cash disbursements (including copies of checks issued, if not part of the bank statements)
- Records of cash disbursement approvals (if not part of the meeting minutes)
- Annual Financial Reports
- Bank Reconciliations

These records should be turned over to the succeeding Treasurer at the conclusion of each term of office. Records should be maintained in accordance with the following schedule:

- Retain cancelled checks should be stored for a minimum of three years and maximum of eight years before disposing of them.
- Section's Bylaws and Annual Financial Reports are the key documents for any Section and therefore should be stored permanently.
- All other financial and operational records shall be maintained for current year plus a minimum of three years.

### **Self Assertion Form**



Section  
Self-Assertion Confi



## **Management of the District Director Travel Fund Established by Sections**

- Sections can establish a travel fund to reimburse Director and/or Deputy director (if applicable) for their district related travel expenses. Approval of such a fund can be discussed and performed during the District Conference or at any other time deemed appropriate by the Sections of the District. No AWS HQ approval is needed for such an action.
- Approval of a fund can be considered granted, when voted and supported by a simple majority of Sections in the District. No Section should be forced to contribute to the fund if a Section chooses to refrain from participation. Utilization of the fund & contributions of the Sections should be reviewed on an annual basis in order to re-affirm an agreement and details for continuing participation.
- Reimbursement of the Director expenses from the fund should only be allowed if the AWS established District Director travel fund has been fully depleted for the year. Deputy Director is an exempt from that requirement as no funds are allocated by AWS HQ for Deputy Director travel expenses.
- Director and Deputy Director utilizing the fund are responsible for keeping an accurate record and supporting documentation of all the expenses. Director and Deputy Director should report their expenses to the Sections on a quarterly or more frequent basis determined by the Sections as part of the voting and approval process. All documentation (meal receipts, mileage logs, hotel bills etc) related to reimbursements of the Fund are subject to the AWS Audit review and should be maintained by a designated Section for current year plus a minimum of three years.
- Approval of the Fund, monetary contributions of individual Sections as well as the process for opening and maintaining a special bank account and reporting should be documented and preserved as a permanent record for the District and retained by a designated Section.

## Section Chairman

The Chairman is the chief executive of the Section. Generally, the Chairman's duties are:

1. Supervise and promote the affairs of the Section under the direction of the Executive Committee.
2. Preside at the meetings of the Section, of the Executive Committee, and be an ex-officio member of all committees.
3. Call meetings of the Executive Committee as frequently as essential to the needs of the Section.
4. Make certain that the financial status of the Section be reported at each Executive Committee meeting, as well as every general meeting. If the Treasurer is unable to attend, it is the Chairman's responsibility to give the financial report.
5. Appoint alternates when not able to preside or serve in line with his/her established duties.
6. Submit a report on Section operations for the administrative year to the members at the annual meeting of the Section.
7. Maintain the correspondence and records of the office and turn over all records to his/her successor.
8. Appoint chairmen to various committees and assign specific responsibilities.
9. Serve as a member on the District Executive Committee.
10. Require periodic progress reports of all committee chairmen.
11. Maintain contact with National and the District Director, and keep the Executive Committee and Section members informed of developments.
12. Appoint a Section Nominating Committee at the February meeting consisting of the latest Past Chairman, to act as Chairman, and at least two other members who, by reason of their experience and loyal service, are qualified to nominate persons for office who will serve the best interests of the Section and the Society.
13. At the March meeting, call for the report of the Nominating Committee and appoint a supervisor and two tellers whose duties will be to certify election results. Announce results to the membership at the April meeting.
14. Appoint two or three auditors to make an annual audit of the Treasurer's books and accounts, and submit their report at the organization meeting to be held in June.
15. Make sure the Section's Annual Reports, Part I and Part II, are mailed on time to National HQ in Miami, before the deadline of July 1, with copies to the District Director.

The Section Chairman serves as chairman of the Executive Committee. When inducted, the Chairman should be prepared to announce the frequency and time for Executive Committee meetings, acquaint the Committee with the selection of Section committee appointments and recommend approval, acquaint them with the proposed program for the forthcoming year, and receive their suggestions.

It is essential that the Chairman be familiar with parliamentary procedure. It is the Chairman's function to see that the Executive Committee performs the duties of its office. In Sections/Divisions where the management organization is small, the Chairman should assign working committee projects to each member of the Executive Committee in the manner for which each member is best qualified.

The overall general responsibility for the execution and supervision of the Section's activities have been placed by the membership in the hands of the Section Chairman. The responsibility is therefore great and the office gives the authority to delegate duties and powers. The Chairman must discharge the duties of the office, know the requirements and objectives of the National Society and the Section, give as much time to the activity as is required by the duties of the office and be aware of the needs of the welding industry in his/her area. The Chairman will fail to advance the Section's progress by becoming lost in details. He/she must use good judgment in making appointments and allow appointees the necessary authority for executing their assignments. It is essential that the Chairman be familiar with all sections of the Operations Manual, as each section deals with activities where the Chairman takes part in responsibility. The Chairman's final responsibility is to turn over all Section correspondence and related material to his/her successor.

The Chairman can devote only a portion of time to Section management. Since Section continuance is dependent upon voluntary service, it is important to delegate Section duties to as many members as are appointed and willing to share management responsibility. Considerable care should be exercised by the Section Chairman when selecting the members to serve on the various committees. Never should a committee Chair be appointed on the basis alone of being available and a nice person. The first requisite is either experience in or adaptability for the work. The second is willingness to assume the responsibility, and the third is availability. Committees are wasteful unless they function and produce. Inactive committees should be discharged. Be certain to clearly define the committee's scope, offer them suggestions, and provide assistance when requested. Require periodical reports until the task has been completed. Express appreciation for work done, even if in your opinion the effort and results fell short of the need.

## **First Vice Chairman**

The First Vice Chairman is the second chief executive of the Section. In the absence or disability of the Chairman, all duties of the “Chair” fall upon the First Vice Chairman. Generally, the duties are:

1. Assume all duties in the absence or disability of the Chairman.
2. Serve as first assistant to the Chairman.
3. At the Chairman’s direction, accept the responsibility for specific Section activities.
4. Serve as Program Chairman for the Section.
5. Serve as ex-officio member of all major committees.

In general, the main duty is to assist the Chairman. This can best be done by accepting the responsibility for supervision of the Section’s committees. The First Vice Chairman should act as a team leader for the Program, Technical, Education and any other special committees. As Program Chairman, he/she should present a token of appreciation to the program speaker on behalf of the Section. The First Vice Chairman, or the Executive Committee, should establish a ceiling price on the cost of this item.

## **Second Vice Chairman**

The Second Vice Chairman is the third chief executive of the Section. In the absence of both the Chairman and the First Vice Chairman, all duties of the “Chair” fall upon the Second Vice Chairman. Generally, the duties are”

1. Assume all duties of the Chairman in the absence of the Chairman and the First Vice Chairman.
2. Serve as second assistant to the Chairman.
3. At the Chairman’s direction, accept the responsibility for specific Section activities.

In general, the main duty is to assist the Chairman. The Second Vice Chairman should act as a team leader for the Membership, Attendance, Hospitality, Entertainment and Publicity Committees. Essentially, they all deal with membership promotion. The efforts of each of these committees must be coordinated in order that the membership is offered a complete package. The Second Vice Chairman may also serve as the Membership Committee Chairman and/or Publicity Chairman.

## Secretary

The Secretary is the official correspondent for the Section. In the absence of the Secretary, these duties fall upon the other officers in the following order: Chairman, Treasurer, First Vice Chairman and Second Vice Chairman. Generally, the duties of Secretary are:

1. Maintain the correspondences and records of the office and turn over all records and correspondence to the successor. Retain records and correspondence for a minimum of three to five years including current Section Bylaws.
2. Serve as Secretary for all Executive Committee and managing committee meetings.
3. Send notices of forthcoming meetings for which he/she serves a secretary to all elected or appointed members and to the District Director at least two weeks prior the meeting.
4. Prepare agenda, under direction of Chairman, for all meetings for which he/she serves as Secretary.
5. Preside at meeting for which he/she serves as Secretary in the absence of the Chairman and Vice Chairmen.
6. Send copies of the minutes, following approval by Section Chairman, to all meetings for which he/she serves as Secretary as soon after the meeting as can be reasonably expected, and at least ten days prior to the convening of the next meeting.
7. Send copies of Executive Committee meeting minutes to the District Director.
8. Provide all new Members-at-Large of the Executive Committee copies of minutes of at least the last three meetings of the Executive Committee.
9. Become familiar with the bylaws, both Section and National, as well as all rulings affecting Section management.
10. Bring to the attention of the Chairman all correspondence, bulletins, notifications and matters affecting the Section's activities as well as those that the Chairman should bring before the Executive Committee.
11. Conduct and promote the affairs of the Section in accordance with the bylaws and rulings as prescribed by the Executive Committee, under the direction of the Chairman.
12. Turn over all monies received to the Section Treasurer.
13. Coordinate with the Section Publicity Chairman the preparation and mailing to both the District Director and National, reports of Section meetings on forms provided by National, accompanied by a report on events of meetings which can be used by the *Welding Journal* for publication. Copy must be received at the AWS office by the 20<sup>th</sup> of the month for it to appear in the *Journal* two months following. For example, publication of Section news in the September issue must be received at National by the 20<sup>th</sup> of July. (See **Submission of**

**Meeting Reports for Publication in the *Welding Journal* found under the Publicity Chairman responsibilities).**

14. Prepare and send to both the District Director and National the Section Annual Report Part I by the due date of July 1 to avoid penalty. Reports are provided by National and mailed to Section Secretaries the first week in April.
15. Send all applications and payments for membership dues received by the Section to National for processing.
16. When membership changes are received from National, adjust records and report any discrepancies promptly.
17. Maintain member and guest meeting attendance records. Make records available to the Membership Chairman for follow-up on membership promotions.
18. Maintain a current mailing list of organizations and individuals who should receive meeting notices in addition to the regular membership.
19. Arrange for and supervise the printing and mailing of all Section meeting notices to a mailing list of members, prospective members, approved organizations, District Directors, National and other Section Secretaries as decided.
20. Supervise the activities of an Assistant Secretary, if authorized.
21. Maintain a current roster listing addresses, telephone numbers, and email addresses of all members of the Executive Committee and others designated by the Executive Committee.
22. Notify the AWS office of changes in mailing addresses of members.

The Secretary must take an interest in all phases of Section operation, and must keep aware of all work being done and projects underway, as the Secretary may be called upon to take over, temporarily, the duties of an absent officer or committee chairman. It is the Chairman's obligation to keep the Secretary informed regarding their Society business activities. All of the Section's business should pass across the Secretary's desk.

## **Treasurer**

The Treasurer is the official custodian of the Section's funds, receiving the Section's money and disbursing it only upon orders made by proper authority. In the Treasurer's absence, the duties are to be administered by the Chairman with the knowledge of the Secretary and the Executive Committee. In the absence of the Chairman and the Treasurer, the duties are administered by the First Vice Chairman.

The Section Treasurer shall provide an accurate and current status of the Section's finances at each Executive Committee meeting, as well as at each general Section meeting. Should the Treasurer not be able to attend, the Chairman shall present the financial report.

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### **Treasurer's Tutorial & Guidance 101** (revised 12-2017)

#### **OVERVIEW**

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**PLANNING, REPORTING AND RECORD KEEPING**

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- N. Compare total expected income to the expense of achieving the Section's objectives and goals. Where projected expenses exceed income, value judgments will have to be made. What programs are most important? What costs can be reduced? Can additional income be found?
- O. Submit the final proposed budget to the entire Board for review and approval. This should not be just a formality. The budget should be carefully presented and reviewed so that once approved, all Section leaders will be firmly committed to the resulting plan of action.

The most carefully thought-out budget will be of little value if it is not compared throughout the year with the actual results of Section operations. As such, the budget should be compared to actual financial statement figures monthly to monitor Section financial activities throughout the year. Properly used, the budget can provide a benchmark that will be an early warning to the Board that financial goals may not be met. A budget, to be effective, should be a working document that forms the basis for action. A budget should not be seen as a restrictive device, but a way of estimating and guiding the spending of Section resources.

The best-prepared budget serves little purpose if the Board is unwilling to take action once it becomes apparent that expenses are exceeding the budget or that income has not been as high as anticipated. The Board should be prepared to modify the Section's plans if it becomes clear that the budget cannot be met. Many budgets fail because the Board does not take aggressive, corrective action. In these instances, the Section's Board is not fulfilling its responsibilities and the budget is a meaningless formality.

Monthly comparison of the Section's budget to actual operating results can also be a very effective internal control. If deviations from the budget are carefully followed up by the Board, the likelihood of a misappropriation occurring without being detected quickly is considerably reduced. Every Board member should ask questions about any item that appears out of line either with the budget or with expected figures.

### **Bank Reconciliations**

One of the most important methods of financial control for a Section is a bank reconciliation of all Section bank accounts. Preparing a bank reconciliation involves reviewing the Section's checkbook balance and bank accounts' cash balances. Reconciliation is the primary method of double-checking the Section's handling of cash receipts and disbursements during the month and exposing any errors.

To facilitate collaboration between Sections and their Districts, as well as to provide accountability and transparency, Treasurers are encouraged to determine an optimal frequency of performing reconciliations of their financial operations with agreement and confirmation of their District Directors (monthly, quarterly etc). Once a frequency is determined, Treasurer should start submitting reconciliations along with the corresponding bank statements to District Director for a review.

### **Annual Financial Report**

The Section Annual Financial Reports, with required documentation (see below), should be submitted to the AWS Headquarters by the July 1 due date for the Sections to receive their Annual Rebates in September. Copies of these Reports should also be sent to the Section's District Director.

#### **5. Annual Financial Report**

6. 12 bank statements for the entire year

3. Self-Assertion Confirmation Form. The form is designed with intuitive PDF features and can be completed and signed without printing (**A new form required to be submitted beginning 2018, see p.17**)

### **Retention of Organizational Records**

The Treasurer should maintain books and records to document transactions by Section year, which runs from June 1 through May 31. These records should be maintained in a neat, orderly fashion by year and type of receipt or expense. Examples of the types of books and records would include:

- Event attendance records
- Board meeting minutes
- Cash receipts and cash disbursements (including copies of checks issued, if not part of the bank statements)
- Records of cash disbursement approvals (if not part of the meeting minutes)
- Annual Financial Reports
- Bank Reconciliations

These records should be turned over to the succeeding Treasurer at the conclusion of each term of office. Records should be maintained in accordance with the following schedule:

- Retain cancelled checks should be stored for a minimum of three years and maximum of eight years before disposing of them.
- Section's Bylaws and Annual Financial Reports are the key documents for any Section and therefore should be stored permanently.
- All other financial and operational records shall be maintained for current year plus a minimum of three years.

### **Self Assertion Form**



Section  
Self-Assertion Confi

### **Rebates to Sections on Membership Dues**

In an effort to assist each Section in performing its much appreciated promotional and administrative work, National refunds portions of dues received from members enrolled in the Sustaining and Individual Member grade classifications. These funds are sent to the Section Treasurer approximately the first week in September, and are included in the Section's Annual Rebate check.

Refunds are not payable on the initiation fee upon enrollment, nor on the memberships of Retired, Life, Student or Transitional members. Penalties for late submission of the Annual Reports reduce the refund. The Section receives a 25% penalty if the report is received after July, and a 75 % penalty if the report is received after September 15.

In addition, each active Section receives from National an Anniversary Payment equal to \$2.00 per member (excluding Student and Transitional) not to exceed \$100. The District Conference Attendee reimbursement is also included in the Section's Annual Rebate.

Each newly organized Section (upon Charter) receives a Charter Payment of \$100 at the time of its Charter.

### **Advantages of Tax Exempt Status to AWS Sections**

Depending upon the size of Section's mailing list, there may be postage savings to be realized. Also, depending upon the local and state laws, it might be possible to obtain exemptions from state and local taxes for purchases made by the Section. Of course, all Sections are exempt from paying Federal income taxes and should not file any return with the Internal Revenue Services. Financial information for all Sections is included with the annual report required to be filed annually by AWS Headquarters with the IRS. Sections having savings accounts or investments should use AWS Employer Identification Number 13-0434890-N.

Information on obtaining a nonprofit bulk third-class postal rate must be obtained from the local post office. Request Publication 13 on "Mailing Permits" and other published information on how to prepare third-class mailings from your local Post Office. Also, obtain forms 3601 and 3624. Complete and return these forms to the Post Office where you will be making your mailings. There are presorting requirements in order to qualify for the special bulk rate, and letters must be mailed at the Post Office issuing the permit. Prepayment of postage is required at the time of mailing or by an advance deposit sufficient to cover more than one mailing.

Information on possible exemption from state and local taxes must be obtained locally, as the laws vary considerably around the country.

A letter may be obtained from National stating the Society's exempt status. If you have any trouble at the local level, please contact the AWS Comptroller at AWS National for additional information or guidance. Do not pursue matters beyond the local level.

## **Awards Chairman**

The Section Awards Chairman coordinates the Awards Committee's selection of candidates for the various awards available through AWS. It is the responsibility of this Committee to select worthy candidates and assist them in completing the necessary application and paperwork. The Committee should also consider scheduling an Awards Night for honoring awards recipients, or arrange time during scheduled meetings for various awards presentations. The Awards Chairman is responsible for ensuring photographs are taken and submitted to the *Welding Journal* for publication. Awards available from National are listed below.

## **Individual Section Awards**

### **Section Appreciation Certificates**

This award certificate, to be signed and dated by the Section Chairman, recognizes outstanding Section Officers/Members with an 8 ½ x 11 certificate suitable for framing. Includes inscription of individual's name, Section name, Section Office if applicable, and short, preprinted text expressing Section's appreciation. Cost: \$5 per certificate. Allow three weeks for delivery. To order or request more information, please contact the Director, Member Services.

### **Industry Sponsor Recognition Certificates**

This appreciation certificate program was initiated to promote and recognize your Section's local industry sponsors. These 8 ½ x 11 certificates, suitable for framing, provide an excellent way for your Section to recognize the companies in your area that support Section activities either financially or in other ways. The certificates will be inscribed with the sponsor's name, year of sponsorship, Section name, and will be signed by the AWS President and Section Chairman.

Cost: Each fiscal year, five certificates will be made available to your Section at no cost. Additional certificates may be ordered at \$5 each. Allow three weeks for delivery. To order or request more information, please contact the Director, Member Services.

### **Section Chairman Appreciation Certificate and Lapel Pin**

This appreciation certificate, recognizing the efforts of Section Chairmen, is automatic, signed by the AWS Executive Director, and mailed directly to Section Secretaries for presentation. There is no cost to the Section and the certificates are mailed in March of each year. Section Chairman lapel pin/tie tacks, inscribed with the AWS logo, are available for \$15. To order or request more information, please contact the Director, Member Services.

### **AWS Distinguished Member Award**

The AWS Distinguished Member Award was created to recognize outstanding service and commitment of AWS Members to the Society and the welding industry. To qualify for Distinguished Member status, applicants must accrue 35 or more points from at least three of the four categories listed on the application form. These include National AWS Leadership, Local AWS Leadership, Professional Development, and AWS Membership Recruitment. Sections are invited to nominate an individual by submitting the completed application form to the Director, Member Services. Award recipients will receive an AWS Distinguished Member Award certificate, suitable for framing, a Distinguished Member lapel pin, and recognition in the *Welding Journal*, as well as in the AWS Awards Directory. Allow three weeks for delivery. To request more information, please contact the Director, Member Services.

### **Silver, Life and Gold Years of Membership Service Award Certificates**

Each September, Section Chairmen are sent a list of the Members in their Section who are eligible that year to receive a Silver (25 years), Life (35 years) or Gold (50 years) membership service certificate. By returning the form provided, Sections are given the opportunity to make the certificate presentations during a Section meeting or special event. There is no cost to the Section for the certificates, which are

suitable for framing. Please keep in mind that in requesting the certificates for presentation, the Section takes responsibility of presenting the awards to the recipients. Otherwise, the certificates will be mailed directly to the individuals. For more information on this awards program, please contact the Director, Member Services.

## **National, District and Section Level Awards**

Each year, the Section Awards Committee recommends candidates for nomination to receive National, District, and Section level awards. Recipients of these awards are selected at the 22 District Conferences held each spring. A representative(s) of your Section attending the District Conference will be responsible for presenting your Section's nominees to the District Awards Subcommittee for selection. The District Awards Subcommittee shall consist of a Chairman and a representative from each Section present. It is this Subcommittee that will select the recipients for the year.

These awards provide an excellent opportunity for Sections to recognize outstanding Members, both nationally and locally. Information, criteria, and applications are available by contacting National or may be downloaded from the AWS website. This information is also mailed to Section Chairmen and Awards Committee Chairmen the beginning of each year, usually in February. For further information on the National , District, and Section level Awards listed below, contact the Director, Member Services.

## **Howard E. Adkins Instructor Membership Award**

### **National Howard E. Adkins Instructor Membership Award**

The Howard E. Adkins Instructor Membership Award is sponsored by Mrs. Wilma Adkins and family, and if given as a means of recognizing high school, trade school, technical institute or junior college instructors whose teaching activities are considered to have advanced the knowledge of welding to students in their respective schools.

Each awardee receives a certificate, two-year full membership in the American Welding Society and complete free registration to attend the AWS Welding Show in the year that the award is presented.

Each District Awards Subcommittee, with their District Director's approval, may submit the name of one nominee by September 1 to the Chairman of the AWS National Awards Committee. A Section may nominate no more than one individual each year. Districts with total membership exceeding 800 may submit one additional nominee. However, no more than one award may be given within a District in any one year. The National Awards Committee selects two recipients for this award. The certificate is presented at the annual Awards Luncheon held during the AWS Welding Show.

### **District Educator Award**

This award was established by the AWS Board of Directors as a means of recognizing candidates at the District level, who have been nominated for the National Howard E. Adkins Instructor Membership Award, but were not selected by the AWS National Awards Committee to receive the National honor.

Criteria for nomination follow the same guidelines as outlined in the description for the Howard E. Adkins Award. All candidates submitted for the Howard E. Adkins Instructor Membership Award will automatically receive the District Educator Award consisting of a certificate that will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting.

### **Section Educator Award**

This award was established by the AWS Board of Directors as a means of honoring candidates at the Section level who were nominated for the Howard E. Adkins Instructor Membership Award, but were not selected by either the AWS National Awards Committee to receive the Adkins Award, or by the District Awards Subcommittee to receive the District Educator Award. Criteria for nomination follow the same guidelines as for the Adkins Award or the District Educator Award. All nominees submitted for, but not receiving either the National or District level Awards may be nominated to receive the Section Educator Award consisting of a certificate that will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting.

## **Private Sector Instructor Award**

### **National Private Sector Instructor Award**

This award was established by the AWS Board of Directors as a means of honoring educators in the welding community teaching in private facilities. These individuals, in the opinion of the AWS National Awards Committee, have advanced the knowledge of welding to their students through apprenticeship programs, internal corporate training programs, and similar nonpublic educational activities.

The AWS District Awards Subcommittee, with their District Director's approval, may submit the name of one nominee by September 1 to the Chairman of the AWS National Awards Committee. A Section may nominate no more than one individual each year. The District Awards Subcommittee may submit the name of one nominee to the Chairman of the National Awards Committee.

Each awardee receives a certificate and free registration to attend all technical sessions and the AWS Welding Show in the year that the award is presented.

### **District Private Sector Instructor Award**

This award was established by the AWS Board of Directors as a means of honoring candidates at the District level, who have been nominated for the national Private Sector Instructor Award, but were not selected by the AWS National Awards Committee.

Criteria for nomination follow the same guidelines as outlined in the description for the National Private Sector Instructor Award. All candidates submitted for this Award will automatically receive the District Private Sector Instructor Award consisting of a certificate that will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting.

### **Section Private Sector Instructor Award**

This award was established by the AWS Board of Directors as a means of honoring candidates at

the Section level who have been nominated for the Private Sector Instructor Award but were not selected by either the AWS National Awards Committee to receive the this Award, or by the District Awards Subcommittee to receive the District Award. Criteria for nomination follow the same guidelines as for the National and District level Private Sector Instructor Award. All nominees submitted for, but not receiving either the National or District level Awards may be nominated to receive the Section Private Sector Instructor Award consisting of a certificate that will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting.

### **Dalton E. Hamilton Memorial CWI of the Year Award**

These awards, administered by the Certification Committee are given annually by the American Welding Society as a means of recognizing AWS members participating in the CWI Program whose inspection, Society, and civic activities are considered to have enhanced public awareness and opinion of both the Society and the CWI Program or otherwise have made an outstanding contribution to the science of welding inspection.

### **Dalton E. Hamilton Memorial National CWI of the Year Award**

District Directors will forward their District's nominations to AWS National headquarters no later than August 1 prior to the year of receipt. The nominations will be held for selection of the recipient which will be conducted at the fall Certification Committee meeting. Districts with total membership exceeding 800 may submit two nominees. The National CWI of the Year recipient is presented a certificate at the annual Awards Luncheon during the AWS International Exposition and Convention.

### **Dalton E. Hamilton Memorial District CWI of the Year Award**

The District Director and District Awards Subcommittee may select an individual or individuals from names submitted by their respective Sections to receive the District CWI of the Year Award. The certificate will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting. The number of recipients recognized is at the determination and discretion of the District Director.

### **Dalton E. Hamilton Memorial Section CWI of the Year Award**

A Section may select an individual(s) each year for Section CWI of the Year Award. The certificate will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting. The number of recipients recognized is at the determination and discretion of the District Director.



## **Meritorious Awards**

### **District Meritorious Award**

The District Meritorious Award is given as a means of recognizing AWS members who have performed some definite or outstanding service to a Section, a District or to the Society. From these exemplary activities, the member has made outstanding contributions to the enhancement of the art and science of welding.

Each awardee receives a certificate from the American Welding Society recognizing their contributions. Each year, with the District Director's approval, the AWS District Awards Subcommittee may submit the name of one nominee by September 1, to the AWS Awards Coordinator. Districts with a total membership exceeding 800, may submit one additional nominee. However, no more than one award may be given within a Section in any one year.

The completed nomination form must be sent to the attention of the Awards Coordinator at the AWS National Headquarters and received no later than September 1. The certificate will be forwarded to the District Director for presentation to the awardee at a suitable setting.

### **Section Meritorious Award**

This award was established by the AWS Board of Directors as a means of honoring candidates at the Section level, who have been nominated for the District Meritorious Award, but were not selected by the AWS District Awards Subcommittee to receive the District Award.

Criteria for nomination follow the same guidelines as for the District Meritorious Award. All nominees submitted for, but did not receive the District Meritorious Award will automatically receive the Section Meritorious Award consisting of a certificate that will be forwarded to the appropriate District Director for presentation to the awardee at a suitable setting.

### **Distinguished Welder Award**

This national-level award has been established to recognize the industry's outstanding welders. Nominations may be submitted at your District Conference. A nomination form, which provides the definition and criteria for this award, is located in the Section Tool Kit, under Awards. Nomination packets should include supporting records, testimonies and documentation. Due date for submission is August 1 for review and selection by the Distinguished Welder Award Subcommittee.

The guidelines below were developed by District 20 to aid in the selection processes of Section, District and National Award recipients at their District Conference. This approach has proven to be very successful in streamlining the selection process at the Conference. Sections may also wish to adapt these guidelines to assist in their selection of candidates to be nominated for awards at their District Conferences.

### **Suggested Guidelines for Nominating and Selecting Section, District and National Awardees**

1. At the annual District Conference, the District Director and/or District Awards Committee Chairman introduces the full slate of award opportunities available, and provides a brief explanation of the desired qualities a recipient should have for each award.
2. District Conference attendees then look at each award to establish which Sections have potential recipients to propose - first Section, then district, and finally National. To truly understand each candidate's qualifications, the individual nominating a potential recipient provides the group with a thumbnail sketch of how that person meets the requirements for the award. Attendees are free to ask questions of the presenter.
3. Presentations and selections are made in the order of Section, District, and National award.
4. Conference attendees then establish – based on the presentations – where best to position a potential recipient. For example, a high school educator may have organized a Skills USA competition for half the state of Wyoming and the group feels that level of effort, although impactful at the Section level, is really the type of activity that warrants District level recognition. In a case such as this, the nominee is elevated from the Section Educator to District Educator Award. Also, it is important to be mindful that the number of potential recipients for some of the District and National awards are limited.
5. In some cases a nominee, though a hard worker at the Section level, has not reached an appropriate level of contribution, or provided a sustaining contribution, deemed by the group to receive an award in the current year. Conference attendees do more than say NO - they recommend ways the individual can enhance his or her contributions so that they will be a candidate for next year's award.

## **Certification Chairman**

The Section Certification Chairman acts as a liaison for Certification programs between the National Certification Committee and the local Section. The Certification Chairman coordinates the administration of certification programs with National's Examination Coordinator.

Generally, duties of the Certification Chairman are:

1. Inform Section Members of the schedule and timetable in administering the Certification programs.
2. Assist prospective candidates in obtaining information/literature on the CWI and other certification programs.
3. Arranges for a stock of AWS QC-1 Standards and applications for local distribution if the Section desires.
4. Coordinates timing of education courses with the certification examination dates.
5. Completes the Section Agreement Form and returns it to National's Certification Examination Coordinator. More detailed information is located on the AWS website in the Section Tool Kit, under Certification.
6. Is responsible for obtaining volunteers to help proctor parts A and C of the exams.

The Certification Chairman is responsible for promoting and coordinating certification programs in the regional area. He/she should be knowledgeable in the CWI requirements and possibly be a Certified Welding Inspector (being certified is desirable, not mandatory).

## **Education Chairman**

The Section Education Chairman acts as a liaison between the educational operations of the Section with those of National. Generally, the Education Committee Chairman's duties are:

1. Inform members of the work and objectives of the various National education committees.
2. Inform the Director of Education at Headquarters of Section educational activities, local needs and instruction material requirements.
3. Promote the advancement of education in the area by all means at his/her disposal.
4. Organize educational courses and lecture series during the fall and spring with a view to providing the type of instruction needed by both the members and local industries.
5. Be in contact with local educational authorities to determine which public schools are teaching welding in the area, who the instructors are, what can be done to help with the programs being taught, and work towards the development of some means for evaluating the performance of the graduating students. Render reports to the Director of Education at National and work towards making improvements wherever possible.
6. Be prepared to answer inquiries pertaining to education and give all possible assistance to those who are seeking means of obtaining tuition or information.
7. Promote AWS Education through Student Chapters in local high schools and colleges.
8. If the Section chooses to establish a Scholarship Committee, he/she will serve on that Committee.

The Education Chairman should evaluate the standard of welding education in the area, and if the standard is low, try to improve it. The Education Chairman should also determine industry's need in the area and try to satisfy this need by promoting the type of education required. He/she should be aware of all educational activities being conducted by the Society and keep in touch with National.

One of the means to effectively reach people who are anxious to learn more about welding is through Section educational courses. Filling the need for instruction on all levels is very desirable for the growth of the Section.

The National Education Committee has prepared a very comprehensive booklet to assist Sections in the organization and operation of Section courses. Copies of this material are available from National.

## **Image of Welding Chairman**

This position was created to assist the Society's efforts to improve the image of welding, improve public recognition of the importance of welding in everyday life, and establish a general understanding in the industrial community of the reliability and effectiveness of welding as a joining process for manufacturing and construction.

Generally, the duties of this position include:

1. To serve as the liaison between the Section and the Public Relations function at National.
2. To receive and implement information aimed at enhancing image-related issues provided by AWS Public Relations.
3. To promote the image of welding in your community by enhancing the importance of welding through Section events, presentations and the local media.
4. Forward Section's image of welding success stories to AWS Public Relations for publication.
5. Promote and nominate worthy candidates for the AWS Image of Welding Awards. The Image of Welding awards are issued in eight categories. These awards recognize individuals and organizations that have shown exemplary dedication to promoting the image of welding in their communities. Nominations will be judged by WEMCO - an Association of Welding Manufacturers, which is composed of executives of welding industry suppliers to promote the welding equipment market. Enhancing the image of welding as a critical industry is among their priority programs. The winners will be announced at the Image of Welding Awards Ceremony to be held during FABTECH. For more information, and a nomination form, visit the AWS website, under Awards.

## **Membership Committee Chairman**

The responsibilities of the Membership Committee Chairman are to enroll new members and retain existing members. It is suggested that the Chairman appoint a least three members to his/her committee so as to effectively cover the area serviced by the Section. Generally, the Membership Chairman's duties are:

1. Develop a membership campaign to commence with the first fall monthly meeting of the Section. Every means possible should be used to bring non-members to the initial meeting. When they are there, the Membership Committee has an important job assisting the Hospitality Committee to make them feel welcomed and to see that they are given a proper opportunity to enroll as new members. Be certain to have application forms on hand.
2. Carefully plan a campaign to reach top management of every company that may be a prospect for one of the following categories of Corporate membership. For information, benefits, and applications on all categories of AWS Corporate membership, please contact Member Services or visit the AWS website.
  - Sustaining Company membership
  - Supporting Company membership
  - Educational Institution membership
  - Affiliate Company membership
  - Distributor Company membership
3. In order to have a healthy Section, members must be representative from all industries in the area, and therefore, all industries should be contacted. Try contacting design agencies of municipalities and government, consulting engineers, architects, county and city engineering departments and state highway departments, as well as local welding shops, distributors, suppliers, and educational institutions.
4. Special effort should be made through school and college officials to enroll and retain Student Members.
5. Work closely with the Program Committee to be certain that invitations are mailed to special groups when programs are scheduled which may have special appeal to them.
6. Actively solicit all distributors of welding equipment and supplies to secure membership enrollment.
7. Acquaint Section members with the annual Member-Get-A-Member campaign whereby AWS Members sponsoring new members during the campaign year, will receive sponsor points, be eligible to receive prizes and have his or her name and Section affiliation listed in the *Welding Journal*. Information on the annual Member-Get-A-Member campaign can be found in the Society News Section of the *Welding Journal*.
8. Promote the value of membership to companies in your area.
9. Constantly remind the Section membership of the value of bringing guests to

Section meetings.

10. Constantly review the Section's "hot sheets," which lists unpaid members as received on a monthly basis from National, and arrange to contact these folks either personally or by letter to secure membership renewal. The "hot sheets" are mailed each month to Section Chairmen unless otherwise specified.
11. Keep an adequate supply of various membership application forms on hand and use them at every opportunity, especially for guests at Section meetings.
12. Make use of your local classified telephone directories.
13. Try conducting a membership campaign in your Section.

The Membership Committee may consist of a Chairman and a minimum of three members, to as large a committee as it takes to effectively cover the area serviced by the Section. It is a good idea for the Second Vice Chairman to serve as Membership Committee Chairman. A year in this important post will acquaint him/her with the Section's personnel and also give a first-hand knowledge of the industries and fields from which members may be drawn. The make-up of the committee should be selected so that every type of industry covered by the Section's membership is represented. It is especially valuable to have someone on the committee who can sell top management on the advantages of Sustaining Company membership, as well as the other Corporate memberships available. There should also be a committee member(s) who can reach the various departments and divisions of larger companies to explain the many benefits of corporate membership, and other members who can speak with engineering, production, supervision and highway officials, as well as architects, consulting engineers, and school and university officials. The committee should have among its members someone who can successfully take over the task of contacting delinquent, unpaid members.

The Membership Committee should be certain that the Hospitality Committee has identification cards or badges for everyone attending the meetings, a different color or type for guests. It should be the duty of the Membership Committee Chairman to collect these cards after the meeting and see that follow-ups are carried out.

Review the application form to understand the requirements of annual dues, initiation fees, and tangible benefits to be derived from membership in the Individual, Student and Transitional classifications, as well as each of the Corporate memberships.

## **Membership Billing Procedure**

New members are accepted on a monthly basis. Applications received at National by the 7th of the month become effective on the first of the following month. This time schedule also applies to address changes, reclassifications and the like.

There is no reinstatement or initiation fee for a “dropped” member who desires to reinstate their membership within two years after leaving the Society

When an educational course or lecture series is sponsored by the Section, contact those attendees who are not members in an effort to secure membership enrollment, as they make excellent prospects. Where there is a charge of these courses, it is suggested that the Executive Committee establish a member fee and a higher fee for nonmembers with the understanding that the higher fee includes a one-year membership (a membership application will need to be completed and sent to National with the correct remittance).



## Suggestions on How to Welcome New Members

The AWS National office processes new member applications normally within two weeks of receipt. New Members receive the following:

- New Member Kits are mailed twice a month and include:
  1. personalized welcome letter
  2. membership card
  3. handsome membership certificate suitable for framing
  4. information on current programs
- Monthly subscription to the *Welding Journal*, with the first issue coinciding with the first month of membership.
- Optional book selection, if requested and paid for, will be received within two to four weeks of joining.

Sections are encouraged to adopt the following suggestions as a minimum, and add to them, to make a new member feel truly welcome in your Section.

### Secretary

1. Send a Section welcoming letter (see sample on following page) immediately after receipt of monthly “roster changes” listing new members.
2. Send a copy of Section welcoming letter to a member of the Hospitality Committee.
3. Add new member’s name and address to mailing list as soon as possible after receiving notification on monthly “roster changes.”
4. Also check monthly “roster changes” for those members who have transferred into the Section and send welcoming letters to these members, as well.

### Hospitality or Welcoming Committee

1. Be sure Secretary has names and addresses of Committee members who will contact new members.
2. Have a Committee member call, email or send an invitation to new member to extend a personal welcome and invitation to the meeting
3. At next Section meeting, Committee member should introduce new member to Section Chairman and as many members as possible. Don’t let the person be neglected.

### Chairman

Introduce all new members individually by name from podium during the first meeting they attend and extend an official welcome.

### Newsletter Editor

List names and company affiliation of all new members and transfers for the month (or since last notice).

## Sample Welcome Letter

**Use Section letterhead.**

Date

Name

Address

Address

Dear (new member\*):

Welcome to the \_\_\_\_\_ Section of the American Welding Society. Your joining our Section is good news, and we hope you will participate in our activities.

Our monthly meetings are held on \_\_\_\_\_ of each month. We look forward to meeting you on \_\_\_\_ (next meeting date) \_\_\_\_ at \_\_\_\_ (location) \_\_\_\_ . We have planned many interesting meeting and activities for this year and invite your participation in each one. This month our meeting will feature a talk on \_\_\_\_\_ by \_\_\_\_\_. This night we will also (mention any special features, such as ladies night, past Chairmen night, joint meeting, etc).

Come join us and enjoy helping us provide an interesting program of meetings and activities. See you soon.

Sincerely,

(Section Chairman)

\_\_\_\_\_ Section

\* A similar letter should be sent to all who have transferred into the Section.

Instead of a letter, Sections may opt to personally phone new members. The above can also be used as a telephone script guide.

## Program Chairman

It is the responsibility of the Program Chairman, in conjunction with the Program Committee members, to arrange for speakers, films, panel discussions, plant tours, etc., for the year.

The Program Chairman handles all invitations and subsequent correspondence and other follow-ups with speakers or plant tour guides. In the event of last-minute cancellations, he/she should be prepared with an alternate program. He/she would also be responsible for obtaining a gift for the speaker, as approved by the Executive Committee.

The Program Chairman should also arrange details for each Section meeting such as obtaining the required audio-visual equipment, transportation if necessary, etc. In other words, to arrange for, and to do everything possible, to ensure that each meeting and special function goes smoothly.

When Sections with small numbers of members request a speaker, it would be well for the Section to try to arrange a coinciding speaking date with a nearby Section. This makes for a more efficient use of the speaker's time and money.

Excellent sources for speakers include the "Speakers Directory," available on the AWS website, programs and abstracts of papers from the Annual Meeting, authors of articles appearing in the *Welding Journal* and write-ups of talks given by speakers at other AWS Sections, found in the Society News portion of the *Journal*.

## Technical Meetings

Meetings of the Section, regardless of the type of program, are called Technical Meetings. There are many types of programs that have been used with proven merit. Some may be received well in your Section while others may meet with discouraging results.

Any address or paper presented before a Section/Division may be offered for publication in the *Welding Journal* under the general provisions established for this procedure.

Among the major patterns of successful programs are the following:

- standard program with a technical speaker
- quiz-type programs
- panel discussion
- round table
- symposium
- demonstration
- plant tour
- Past Chairman's Night
- National Officer Night
- Student Night
- Awards Night

Other types of Section events might include a Ladies Night, golf tournament, dinner cruise/theater, etc.

The Program Chairman should be informed of the projection requirements of the speaker well in advance of the meeting and that proper projection equipment, if needed, be on hand. The operator of the equipment should have a brief session with the speaker in order to finalize any last minute details. The operator should not only be familiar with the projection equipment, but also where the various electrical outlets and light switches are located in the meeting room.

The programs should start on schedule as announced to the members. The social hour should come to a close as scheduled with the dinner and meeting portion starting on time. Some Sections have their social hour after the technical meeting, while many hold the social hours prior to dinner. There are others that do not conduct a social hour.

The Section Chairman generally greets the audience, briefly reviews business matters that should be brought to the attention of the membership and introduces the Program Chairman for the evening.

The Program Chairman should announce the next event that might be a film or general topics speaker, who might present a 10 to 15 talk. Some Sections may wish to extend the time allotted to the general topic speaker depending upon the balance of the program.

After expressing appreciation to the general topics speaker, the Program Chairman may wish to call upon the Section's Technical Representative to give a brief review of the latest AWS codes and standards, or call upon the Membership Chairman to give a short talk on membership promotion. In some instances, the Program Chairman might want to call for a five-minute break prior to the introduction of the main speaker for the evening, or other type of program to follow.

Upon completion of the main speaker's presentation, the meeting might be opened for discussion, including a question and answer period. The Program Chairman should be careful not to allow the discussion to over-extend itself, and return the meeting to the Section Chairman for conclusion.

The Section Chairman should advise the audience of the date, subject and speaker's name for the next meeting, encouraging them to attend and invite their business associates to attend, as well. The Chairman should also express appreciation to the various presiding Chairmen of the evening, and, in particular to the main speaker for his/her contribution. The Chairman should present a token of appreciation to the speaker as was decided by the Executive Committee.

#### Arrangements for Securing Speakers

The selection of technical speakers to talk before your Section is very important to further the success of your Section operation. The speaker should be chosen on technical background and experience as well as ability to properly communicate to the audience. The subject should be of direct interest to the majority of its members.

Invitations to speakers should be in writing, or at least confirmed in writing. Speakers in private practice need this for IRS purposes and those on salary are generally required to show such a document to their employer.

When the invitation has been accepted, the speaker should be provided with a copy of the meeting announcement pertaining to his/her presentation. The Program Chairman should contact the speaker and offer to arrange sleeping accommodations in the event they should be needed. The speaker should also be advised of the time allowed for the presentation and the probable occupational representation of the audience. The Program Chairman also needs to know the speaker's projection requirements, if any.

At least three weeks prior to the speaker's appearance, the Program Chairman should once again contact the speaker to be certain plans have not changed and to offer local transportation if needed, or to meet at a pre-determined place and travel to the meeting together. Upon arrival at the meeting, the Program Chairman should introduce the speaker to the Executive Committee and other prominent people in attendance. Everything should be done to make the speaker feel welcome.

Following the presentation, the meeting should be opened for discussion if the talk warrants audience-speaker participation. When the discussion period has concluded, the Program Chairman, Chairman, or other designate should thank the speaker for the presentation and then present the Section's token of appreciation. It is recommended that within the following week, a thank-you letter be sent by either the Section Chairman or Program Chairman to the speaker and his/her employer, if known. This not only pleases the speaker, but encourages the employer to do more of this type promotion, and thereby contributing to the advancement of the welding industry.

### **Speaker/Presenter Guidelines**

All speakers/presenters should be sensitive to diversity within the AWS community with regards to gender, race, religion, age, ancestry, sexual orientation, national origin, and issues of ableism.

The following guidelines serve as a supplement to any formal or informal policies that an AWS entity (department, committee, task group, Section, event, etc.) may use in conducting their business and are provided from a diversity and inclusion standpoint.

- **Language** – Use inclusive language that demonstrates respect for all people and cultures. Be sensitive to your audience in your choice of words and use of anecdotes. Always keep in mind that yesterday's joke may be today's blunder. Use non-sexist language throughout your presentation and avoid gender-biased comments (e.g., assuming all secretaries are female, all welders are male, etc.). In addition, gender neutral terms should be used, such as "Chair" instead of "Chairman".
- **Presentations** – Avoid visual aids that show people in stereotypical roles. Actively seek out images of people from diverse ethnic groups. Refrain from making assumptions about those in the group other than a common interest in the content.
- **Name Pronunciation** – Ensure proper name pronunciation for individuals you may need to announce at the event. The AWS staff member or volunteer coordinating the event (if applicable) can assist in providing the phonetic spelling and proper pronunciation of names that will be announced.

**Additional information** - Key terms and other tips on appropriate language (Winning Words and Negative Words).

- **Diversity:** The word “diversity” can mean different things to different people. It is a concept that goes far beyond just individual differences like race, ethnicity and gender. We’ve defined it broadly to encompass acceptance and respect for all people, understanding and recognizing we’re all unique, and exploring our differences in a safe, positive and nurturing environment.
- **Inclusion:** “Inclusion” refers to the degree to which diverse individuals are able to participate fully in the decision-making processes within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”
- **Winning Words:** The key words and phrases on the following page underpin an effective narrative for describing diversity and inclusion in a meaningful, inspiring way.

## **WINNING WORDS**

<b>Winning Word</b>	<b>Benefit</b>
<b>Common Good</b>	It is important for everyone to be able to see themselves as part of this effort. The “common good” is a universal value that everyone can connect to.
<b>Diversity and Inclusion</b>	Diversity and Inclusion (D & I) is what we are striving to advance. Greater diversity and inclusion will strengthen and increase our impact in our organization.
<b>Greater Impact</b>	While many may appreciate the moral values behind D & I, they want to know that advancing D & I in their organization will help them better achieve their mission.
<b>Perspectives</b>	Emphasizing the “variety of perspectives” brought to the table can help people intuitively understand how increasing D & I can improve effectiveness.
<b>New Voices and Expertise</b>	Highlighting the tangible benefits of having diverse people at the table motivates people to support action to advance diversity—because they can more easily picture how it will strengthen their organization.

## NEGATIVE WORDS

<b>Negative Word</b>	<b>Disadvantage</b>
<b>Girls</b>	Groups of women should not be referred to as girls because it is belittling and offensive.
<b>“Hey Guys”</b>	Chose a gender neutral alternative for example “Hi everyone”.
<b>Sweetie, Honey or Dear</b>	It is non-professional and sexist language.
<b>The Common Man</b>	The average person/ordinary people/people in general.
<b>A Chinese Professor</b>	Instead use “a Professor”. Avoid using irrelevant, gratuitous ethnic descriptions.
<b>The Disabled</b>	Say a person or people “with disabilities.” Put the person first. A disability is what someone has, not what someone is. For instance, “mentally ill” is less respectful than “person with mental-health issues.” “Retarded” is never an appropriate term. Say “intellectual disabilities” or “cognitive disabilities.”

## **General Information**

### Liability for Bodily Injury and Property Damage

Depending on the circumstances, Sections may be liable for damages resulting from bodily injury or property damage in connection with Section activities. Fortunately, AWS and similar societies have a very good, almost accident-free record. However, in today's climate of injured parties being prone to sue, it is prudent to take steps to minimize exposure to such suits, while at the same time not curtailing activities. AWS provides, at no cost of the Sections, public liability insurance covering their Section's activities for bodily injury or property damage to cover just such occurrences in the unlikely event that they happen.

**Special events**, which may increase normal exposure, such as exhibits, large picnics, athletic events, welding contests, etc., sometimes are beyond the scope of the policy. These events must be reported in advance to AWS Membership Services, using the attached form, in order for our insurance administrator to determine if existing coverage is provided and if it is adequate. Also, for activities such as an exhibit in a shopping mall or plant facility, proof of "Certificate of Insurance" may be required by the owner or leaser of the facility. When a Certificate is required, Sections will be charged a minimal processing fee.

Even though there is insurance coverage, Section Officers should assume responsibility to minimize chances of accident and exposure to liability. Some suggestions are:

- (1) Have alcoholic beverages dispensed by and under control of a restaurant, caterer or some other independent service contractor. Reputable and responsible business entities also carry liability insurance.**
- (2) When services are provided by a restaurant, caterer or independent contractor, obtain a certificate of insurance identifying the insurance carrier and the amount and type of liability insurance. These certificates are issued by all insurance carriers upon request by the insured person (s).**
- (3) Limit social periods before meeting to 30-45 minutes. Stop serving complimentary alcoholic beverages at the end of the social period.**
- (4) Arrange transportation for anyone who looks to be in no condition to drive.**
- (5) Look for, and eliminate, any hazardous conditions which might cause injury.**

Neither persons nor companies are recommended to be used as sponsors for hospitality periods or activities involving alcoholic beverages. In the event of an accident, they could become involved in a lawsuit. Instead, it is suggested that contributors be identified as patrons of the Section and be so publicized, with their monies going to the Section's general account.



Send completed request form to:

American Welding Society  
Attn: Membership Services  
8669 NW 36<sup>th</sup> St. #130  
Miami, FL 33166

**HIGH RISK EVENT PROOF OF INSURANCE REQUEST**

AWS Section Insured: \_\_\_\_\_

Description of Event: \_\_\_\_\_

\_\_\_\_\_

Date, Time & Duration of Event: \_\_\_\_\_

Address of Event: \_\_\_\_\_

\_\_\_\_\_

Expected attendance: \_\_\_\_\_ Age range: \_\_\_\_\_

Any special activities being planned, e.g., boat rides, athletic events, fireworks display, mechanically operated amusements devices or watercrafts, musical concert, aircrafts (including hot air balloons), etc. \_\_\_\_\_

Liquor sold? \_\_\_Yes \_\_\_No Provided by Section? \_\_\_Yes \_\_\_No

Provided by independent service contractor? \_\_\_Yes \_\_\_No

Food sold? \_\_\_Yes \_\_\_No Provided by Section? \_\_\_Yes \_\_\_No

Provided by independent service contractor? \_\_\_Yes \_\_\_No

Race event? \_\_\_\_\_ Run or Walk? \_ Length of course? \_\_\_\_\_

Periodic checkpoints? \_ Water provided? \_\_\_\_\_

Availability of emergency medical equipment & personnel? \_\_\_\_\_

Roads blocked off by proper authorities? \_\_\_\_\_

Athletic waivers being signed? \_\_\_\_\_ Do they indicate fitness of participants? \_\_\_\_\_

\* Request submitted by: \_\_\_\_\_

\_\_\_\_\_

Address

Section Office Held \_\_\_\_\_

Telephone Number \_\_\_\_\_

date \_\_\_\_\_

**Cost: \$50 per high-risk event. \$100 additional fee is required if co-insured is requested.**

- **Certificate will be sent to the AWS Section Officer making the request. Allow four weeks for processing.**

## Publicity Chairman

The Publicity Chairman should be in a position to supply all local channels of communication with news of the Section and to work closely with National on matters pertaining to publicity and public relations. It is recommended that the Publicity Chairman be appointed for at least two years. Generally, the duties of the Publicity Chairman are:

1. Prepare copy on all newsworthy Section activities in ample time for the deadlines of the media selected.
2. Prepare copy for the *Welding Journal* and submit all material to the Society News Editor. Meeting reports received prior to the 20<sup>th</sup> of the month will be published in the second issue following. For example: a report received on November 18<sup>th</sup> will appear in the January issue. Reports received after the 20<sup>th</sup> of the month will be published three months following. Example: a report received on November 22<sup>nd</sup> will appear in the February issue of the magazine. (See attached **Submission of Meeting Reports for Publication in the *Welding Journal***).
3. Arrange for photographs to be taken at Section meetings and other events. Make certain that photographs submitted to National are clear and that all individuals are identified by first and last name.
4. Maintain close cooperation and contact with National. Notify the *Welding Journal* staff immediately of any news item of national interest in order that the widest coverage may be obtained.
5. Report to National any movement, action, laws, or the like, which could in any way be detrimental to the welding industry.
6. Contact press, radio and T.V. stations for publicizing the Section's activities.
7. Use direct mail where practicable.
8. Work closely with your Section's Image of Welding Chairman to promote and publicize image of welding in your area.

It should be the desire of the Publicity Chairman to create a favorable climate for welding in his/her area. He/she should use publicity as a tool to accomplish this end and use all local channels of communication to inform the largest possible audience of Section activities. It is his/her responsibility to be on the alert for all newsworthy items.

To assist the Section in preparing for this activity, contact the AWS Communications Department.

## **Reporting Section News for Publication in the *Welding Journal***

**Use the *Section Meeting/Event Report* form to report your news.**

E-mail the completed form with any digital photos attached to Cindy Weihl at [cweihl@aws.org](mailto:cweihl@aws.org) with a copy to your District Director.

You should receive a prompt reply to every e-mail you send to the Journal. If you do not, please call (800/305) 443-9353, ext. 256.

**Report Writing Tip:** Review reports published in back issues of Section News for ideas. Be sure to name everyone who receives an award. Identify the meeting place and city, names of tour guides, Section activities, etc. Write a complete caption for each photo attached with the names listed from left to right to clearly identify everyone.

### **Photo Tips:**

Study photos published in back issues of Section News to get ideas on how to pose people.

Ask people to pose for each photo rather than take impromptu shots “on the fly.”

Ask the Chair to schedule “Photo Op” on the meeting agenda so people will be prepared.

Subjects of interest include group shots, presentation of speaker gifts, golf outings, contest winners, students’ and ladies’ nights, election of officers, picnic groups, tour groups, welding contests, etc.

When two or more people are recognized at a meeting, pose all of them together for a group shot. Move the camera close to the people. Photos taken from a distance often lack detail and proper lighting. Never pose people in the light from a slide projector that makes images appear on their clothing and skin. A tip from the pros: Mount the camera on a tripod for sharpest images, and take several shots of each scene to select the best posed and exposed shot for publication.

If you are unsure about a photo, just send it in and we’ll let you know how it works for us. E-mail each photo as a separate JPEG file with the meeting report. Large, well-exposed photo files publish best. Aim for file sizes greater than 1 megabyte. Do not send photos embedded in Word documents or newsletters as they cannot be published.

### **Publishing Schedule:**

Section reports and photos received on or before the 20<sup>th</sup> of the month will appear in the *Welding Journal* issue mailed about five weeks later. Example: Reports received by noon April 20 will appear in the June issue. Reports received April 21 will appear in the July issue.

Important: Should your meeting notice not appear in the expected issue of *Welding Journal*, please e-mail [cweihli@aws.org](mailto:cweihli@aws.org) or call (800/305) 443-9353, ext. 256, immediately.

### **Special Events**

Sections desiring special announcements or advance publicity for educational programs or other activities should send the necessary information to National about 75 days before the event to ensure that it appears in the *Welding Journal* for at least a month before the event.

## **Scholarship and Foundation Representative**

The Scholarship and Foundation Section Representative reports to the Section Chairman and will interact with the AWS Foundation. Generally, the duties of this position include:

1. Establish and promote a local Section scholarship program. If the Section chooses to establish a Scholarship Committee, he/she will be designated Chairman of that Committee. Guidelines and local scholarship awards will be established by this Committee and distributed at the Committee's determination. This Committee, when called upon, will assist the National Scholarship Committee in the reviewing of candidates from their geographical area.
2. Distribute scholarship information and applications for both your local scholarships and the AWS National and District Scholarship Programs.
3. Coordinate your Section's nominations for District and National Scholarship (**see AWS Scholarship Programs below**)
4. In conjunction with the Section Treasurer, establish and oversee a Section Agreement with the AWS Foundation. For more information on establishing a Section Agreement, contact the AWS Foundation.
5. Enhance the communication between your Section and the AWS Foundation. Representatives will receive the following material from the Foundation for Section use:
  - Monthly AWS Foundation updates
  - Materials for hosting a Student Night
  - Student Scholarship Handbooks
  - Ideas for fundraisers to build your Section scholarship fund
  - Suggestions for starting a local scholarship fund
  - Copies of AWS Foundation press releases

### **AWS District and National-level Scholarships**

#### **District Scholarships**

Districts are allocated \$10,000 annually for District scholarships. Each year, Conference attendees participate in the important task of selecting the District Scholarship recipients from their areas. The District Scholarship application is now online. To access the scholarship portal, please visit the AWS website at <https://scholarship.aws.org>.

To assist Sections in the evaluation of scholarship applicants, a sample of the [scholarship summary scoring method](#) used by the National Scholarship Committee is provided in the Section Tool Kit, under District Conferences. This scoring method may be used by Sections in the evaluation and selection of District and/or your local Section scholarship recipients.

### **Educators Scholarships**

Recipients for three National Educator Scholarships will be selected by the National Education Scholarship Committee. In addition, each District will have an additional \$750 in scholarship money to award specifically to a deserving instructor within their Districts at their annual District Conferences. Note the deadline for submitting applications is March 1.

### **National Scholarships**

The AWS Foundation has expanded its national scholarship program, which now includes a wide variety of individual scholarships each worth a minimum of \$2,500 annually. These scholarships are for students pursuing a specific degree at an accredited four-year college or university. To take advantage of this program, students will need to plan now for the following year. Professors and instructors of vocational schools, technical colleges, community colleges and universities are encouraged to share this valuable information with their staff and students. The deadline for applying is February 15.

### **Welder Training Scholarships**

#### **Purpose**

The AWS Welder Training Scholarship is for students seeking welder training in a program up to two years, and cannot be used for credits towards a four-year program.

#### **Eligibility Overview**

This scholarship is available to AWS Districts to provide funds to students seeking welder training through a trade school, community college, or other facility providing welder training programs, such as Tulsa Welding School and Hobart Institute of Welding Technology.

#### **Eligibility Requirements**

To view the specific eligibility requirements for this scholarship, please [click here](#) to view the application.

#### **Submission Deadline**

The AWS Welder Training Scholarships will be available year round (January 1-December 31) until the District awards the designated \$10,000 for the year. Funds not used from January 1 to December 31 may not be carried over into the next year. Please note, the deadline for the applicant to submit to headquarters is December 15th to allow time for submission before year end cut off.

#### **Application Process**

Applications should be sent to the AWS Foundation at 8669 NW 36 Street, #130, Miami, FL 33166. Foundation Staff will email the applications received to the District Director on the first of each month.

#### **Selection**

The District Director may form a selection committee from Section members located within the District. Efforts should be made by the District Director to ensure that all recipient selections are fair and transparent.

#### **Awards**

\$10,000 will be made available to each District for these scholarships. Ten awards at \$1,000 each may be made to ten different recipients. Awards are for tuition and fees only. No awards will be paid to the recipients, and will be paid directly to the academic institution by the AWS Foundation.

**Further information on the above listed scholarship programs may be found on the Foundation page on the AWS website**

**Section Scholarship Committee and Program Guidelines**

Many AWS Sections have very successful and active scholarship programs. Guidelines have been developed to further assist Sections in establishing programs or re-visit their current programs. It is a document developed for the sole purpose of assisting Sections in their scholarship projects and is not intended to place restrictions or controls for managing a scholarship program. These guidelines are located on the Foundation page on the AWS website.

To obtain more information on all of the AWS Scholarship Programs, contact the AWS Foundation.

## **S.E.N.S.E. and Student Affairs Chairman**

**About SENSE** – **Schools Excelling through National Skill Standards Education** - was originally published in 1995-1996 to establish standards and guidelines for welder training in three levels:

- Level I: Entry Welder
- Level II: Advanced Welder
- Level III: Expert Welder

Upon successful completion of each level of the standards and guidelines, students may test to receive a certificate of completion. Level I is designed for application at grades 10-12 or entry level training. Level II is designed for two year career and technical education programs or for those with welding experience. Level III is for those in four-year programs or those with advanced experience. An overview of the SENSE program, a SENSE school locator map and other information on the program may be found on the AWS website, on the Education drop-down menu.

The S.E.N.S.E. and Student Affairs Chairman must be (or have been) a Welding Educator. The Section S.E.N.S.E. and Student Affairs Chairman reports to the Section Chairman and interacts directly with the National Educators Committee. Generally, the duties of this position include:

1. Promote the S.E.N.S.E. Program
2. Establish and maintain a mechanism to communicate with local welding educators.
3. Assist in developing ways to improve the image of welding.
4. Develop programs to gain industry-supported co-ops.
5. Be in contact with local educational authorities to determine which public schools are teaching welding in the area, which programs are being taught, and assist in the implementation of the S.E.N.S.E. program.
6. Promote AWS education through Student Chapters in local high schools, technical schools, and colleges.
7. Build a bond between industry and education at the local level.
8. Provide information to the Educators Committee as to the needs of the local schools, feedback on what programs and promotions were successful and those that were not.
9. Evaluates and identifies any specific demographic needs for the area, then assist the schools in enhancing the S.E.N.S.E. program to ensure employability locally.

## **Student Member Liaison**

Recognizing that Student Members are the future of the industry and the Society, the position of Student Member Liaison was established in 2013 to enable Sections to take advantage of the unique perspective and contributions Student Members can offer.

Duties of this position include:

1. Serve as the liaison between the Section and Student Chapters and/or local welding programs in the area
2. Plan and organize at least one Section meeting per year
3. Organize students in your area to select, plan and complete a community project
4. Promote AWS scholarship opportunities to schools in the community, as well as to students
5. Encourage formation of Student Chapters at local schools
6. With the assistance of other Section leaders, develop a membership campaign to recruit new student members
7. Contact the AWS Membership Department for a quantity of student membership applications and benefit information
8. Visit high schools in the area to promote welding as a career
9. Contact the AWS Foundation for careers in welding magazines, videos and handouts
10. Assist Section Officers in the planning and organization of meetings and events throughout the year
11. Assist Section Officers in establishing a Member/Student Mentor Program



## Technical Representative

The Technical Representative is the official custodian of the Section's technical publications provided by National, for the Section library. Generally, the duties of the Technical Representative are:

1. Maintain a complete set of the Society's codes, standards, specifications and books on welding, as furnished by National, and keep National informed of its location.

As your Section's Technical Representative, you will receive notification of available publications periodically throughout the year. Section Chairmen will be copied on each list.

Upon receiving these lists, please discuss the available publications with other members of your Section's Executive Committee to determine which books would be best suited for your library. Then simply check off the selections and fax the list back to Member Services by the due date specified. All selections received by that date will then be forwarded to the AWS bookstore, World Engineering Exchange for shipment. It is important that this information is received by the specified date to insure that publications are shipped to requesting Sections as quickly as possible.

*NOTE:* For those Sections that did not appoint a Technical Representative on their Annual Report, this information will be sent only to the Section's Chairman, and the requested publications will be sent directly to the Chairman for inclusion in the Section's library, as well.

2. Maintain other technical publications that may become the property of the Section.
3. Maintain an adequate supply of AWS Publication Catalogs and have them available at Section meetings and other events, as warranted.
4. When new publications are received from National, arrange to acquaint members of the Section with the new publications and have them available at the next meeting.
5. When a successor has been appointed, information on all publications contained in the Section's library should be turned over to the newly appointed Technical Representative, and National notified of this change.
6. Replacement and/or additional copies of AWS publications are available to Sections at a 40% discount off the list price. (See the procedure for ordering AWS publications at the 40% Section discount.)

## **Procedure for Ordering AWS Publications Using the 40% Section Discount**

AWS Sections are entitled to receive a discount on AWS produced publications. It is recommended that the proceeds then be used toward the Section's scholarship fund. The Section discount is 40% off the publication's list price.

**In addition to the procedure below for ordering publications using the Section discount, all Section Officers, especially those tasked with the resale of publications by your Section, should be made aware of, and understand, the AWS Board approved Policy for Section Publication Sales.**

In order for Sections to receive the 40% discount, orders must be submitted in writing to the Member Services Director. The orders may be faxed or emailed and must include the following information:

- Section name
- Bill to address
  1. Section Treasurer's name
  2. Company name (if applicable)
  3. street, city, state, zip code or country and postal code
  4. telephone number
  5. fax number
  6. email address

NOTE: The bill to address will always be the Section Treasurer
- Ship to address and phone number (if different than bill to address)  
**No PO Box numbers**
- Document code(s) and quantity

Note: Document codes, pricing, and shipping and handling costs must be obtained from the AWS Bookstore.  
Phone: 305-443-9353 x 280  
Website: [www.awspubs.com](http://www.awspubs.com)
- Payment method, i.e. PO#, credit card

Note: The AWS Bookstore will extend credit to Sections for up to \$1,000 without a PO#. For orders that are not pre-paid that are over \$1,000, the Bookstore will require a PO# or, in lieu of a formal PO, they will accept a letter on Section letterhead.

Your orders must first be faxed (305) 443-5647 or emailed to [eandino@aws.org](mailto:eandino@aws.org). Orders will then be forwarded to the Bookstore for processing. If you have any questions, please feel free to contact Evelyn Andino at 800-443-9353 x 258 or [eandino@aws.org](mailto:eandino@aws.org).

## Policy for Section Publication Sales

At the recommendation of the Audit Committee, and approved by the AWS Board of Directors at the spring, 2010 meeting, the following policy regarding Section publication sales is now in effect.

***It is important that all Section Officers tasked with ordering AWS publications for resale are made aware of the policy change.***

The Audit Committee recommended to the AWS Board of Directors to approve the passing of a resolution stating that all publications must be sold according to the policy below. The policy applies to publications sold by WEX and/or those sold directly by the American Welding Society, including Section sales:

- Members may receive a discount of 25% from the non-member price in effect at time of sale.
- Non-members are not entitled to any discount on publications.
- Educational Institutions are entitled to a 40% discount from non-member prices.
- Sections are entitled to a 40% discount on publications but **must resell** at the discounts shown above to Members, Non-Members and Educational Institutions.
- Sections may choose not to charge freight to any organization. WEX must charge freight applicable to all direct sales.

In addition, the Audit Committee recommended the following audit procedure relating to publication sales. This audit procedure was also approved by the AWS Board of Directors at the spring, 2010 meeting.

- Audits should be performed on a random sampling of the top ten Sections that purchase publications to ensure that none are sold for less than the 25% discount.

- An accounting of publication sales should be completed quarterly by section and returned to AWS Headquarters. Audits should be performed on any section with sales margins less than standard.
- Any Section found to sell less than standard discounts (except for freight) will be warned one time and then stopped from making future purchases of publications for sale. It is also recommended that the AWS Headquarters pay freight for publications whose weight exceeds ten pounds.

To not be subjected to IRS review, it is very important for Sections to note that the recommended method of payment for Section publication orders is via Section check.

In addition to Section Chairman, this information will be provided in hard copy, as well as electronically, to Section Secretaries, Treasurers, and Technical Representatives. As mentioned previously, please notify any other Officers in your Section who may be tasked with publication resale of this new policy.

Questions regarding this policy change should be directed to Ilya Gekhman, Director Internal Control. Ilya may be reached at 800-443-9353 x 285 or [igekhman@aws.org](mailto:igekhman@aws.org).

# Robert's Rules of Order and Parliamentary Procedure

## Background

Parliamentary procedure (or law) originally referred to the customs and rules for conducting business in the British Parliament and later referred to deliberative assemblies in general. In Great Britain, these procedures form a part of the unwritten law of the land, and in our own legislative bodies they are the authority in all cases where they do not conflict with existing rules or precedents.

Henry Martyn Robert was an engineering officer in the regular U.S. Army in the late 1800s. Without warning he was asked to preside over a church meeting, and to his embarrassment he realized that he did not know how. This situation, familiar to many of us who have been in heated or disorderly union meetings, left him determined never to attend another meeting until he knew something of parliamentary law.

Ultimately, he discovered and studied the few books then available on the subject. As he was transferred to various parts of the United States during his military service, he found virtual parliamentary anarchy, since people from different parts of the country had differing ideas about correct procedure.

In 1876, General Robert set out to bring the rules of parliamentary law (by then adopted by the U.S. Congress) to members of ordinary societies and organizations with the publication of the *Pocket Manual of Rules of Order*. It sold half a million copies before it was completely reworked in 1915 and published as *Robert's Rules of Order Revised* and made Robert's name synonymous with the orderly rules in deliberative societies. In 1970 it was substantially expanded and became *Robert's Rules of Order Newly Revised*.

The rules of parliamentary law are constructed upon a careful balance of the rights of the majority, of the minority (especially a strong minority greater than one-third), of individual members and of absentees. Fundamentally, under the rules of parliamentary law, a deliberative body is a free agent-free to do what it wants to do with the greatest measure of protection to itself and of consideration for the rights of its members.

The current edition of *Robert's Rules* has been developed through a process of updating the book with the growth of parliamentary procedure. All editions of the work issued after the death of the original author have been the work of persons who either knew and worked with the original author or knew and worked with persons who did.

*Robert's Rules of Order Newly Revised* is designed to provide an answer to nearly any possible question of parliamentary law. It is, therefore, quite detailed. The average person may only occasionally be confronted with the small points that are necessarily dealt in the book, but if you attend many union meetings, you will probably want to own a copy (visit the official Robert's Rules of Order Web site, <http://www.robertsrules.com/>. for information and to order a hardback or paperback copy).

Parliamentary procedure is a time-tested method of conducting business at meetings and public gatherings. It can be adapted to fit the needs of any organization. Today, *Robert's Rules of Order Newly Revised* is the basic handbook of operation for most unions, clubs, organizations and other groups, so it's important that everyone know these basic rules!

## The Basics of Parliamentary Procedure

1. The purpose of parliamentary procedure is to make it easier for people to work together effectively and to help groups accomplish their purposes. Rules of procedure should assist a meeting, not inhibit it.
2. A meeting can deal with only one matter at a time. The various kinds of motions have therefore been assigned an order of precedence
3. All members have equal rights, privileges and obligations. One of the chairperson's main responsibilities is to use the authority of the chair to ensure that all people attending a meeting are treated equally--for example, not to permit a vocal few to dominate the debates.
4. A majority vote decides an issue. In any group, each member agrees to be governed by the vote of the majority. Parliamentary rules enable a meeting to determine the will of the majority of those attending a meeting.
5. The rights of the minority must be protected at all times. Although the ultimate decision rests with a majority, all members have such basic rights as the right to be heard and the right to oppose. The rights of all members--majority and minority--should be the concern of every member, for a person may be in a majority on one question but in minority the on the next.
6. Every matter presented for decision should be discussed fully. The right of every member to speak on any issue is as important as each member's right to vote.
7. Every member has the right to understand the meaning of any question presented to a meeting and to know what effect a decision will have. A member always has the right to request information on any motion he or she does not thoroughly understand. Moreover, all meetings must be characterized by fairness and good faith. Parliamentary strategy is the art of using procedure legitimately to support or defeat a proposal.

### Conducting a Meeting

Members express themselves in a meeting by making motions. A motion is a proposal that the entire membership take action or a stand on an issue. Individual members can:

- Call to order
- Second motions
- Debate motions
- Vote on motions

### There are four basic types of motions:

- **Main motions:** The purpose of a main motion is to introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and they yield to subsidiary, privileged and incidental motions.
- **Subsidiary motions:** Their purpose is to change or affect how a main motion is handled, and is voted on before a main motion.
- **Privileged motions:** Their purpose is to bring up items that are urgent or important matters unrelated to pending business.
- **Incidental motions:** Their purpose is to provide a means of questioning procedure concerning other motions and must be considered before the other motion.

## **How motions are presented:**

### **Obtain the floor**

- Wait until the last speaker has finished.
- Rise and address the chairperson by saying, "Mr./Ms. Chairperson" or "Mr./Ms. President."
- Wait until the chairperson recognizes you.

### **Make your motion**

- Speak in a clear and concise manner.
- Always state a motion affirmatively. Say, "I move that we ..." rather than "I move that we do not..."
- Avoid personalities and stay on your subject.

### **Wait for someone to second your motion**

- Another member will second your motion or the chairperson will call for a second.
- If there is no second to your motion, it is lost.

### **The chairperson states your motion**

- The chairperson will say, "It has been moved and seconded that we ..." thus placing your motion before the membership for consideration and action.
- The membership either debates your motion, or may move directly to a vote.
- Once your motion is presented to the membership by the chairperson, it becomes "assembly property" and cannot be changed by you without the consent of the members.

### **Expanding on your motion**

- The time for you to speak in favor of your motion is at this point in time, rather than at the time you present it.
- The mover is always allowed to speak first.
- All comments and debate must be directed to the chairperson.
- Keep to the time limit for speaking that has been established.
- The mover may speak again only after other speakers are finished unless called upon by the chairperson.

### **Putting the question to the membership**

- The chairperson asks, "Are you ready to vote on the question?"
- If there is no more discussion, a vote is taken.
- On a motion to move the previous question may be adapted.

### **Voting on a motion**

The method of vote on any motion depends on the situation and the bylaws of your organization. There are five methods used to vote by most organizations, they are:

- **By voice--**The chairperson asks those in favor to say "aye," those opposed to say "no." Any member may move for an exact count.
- **By roll call--**Each member answers "yes" or "no" as his name is called. This method is used when a record of each person's vote is required.
- **By general consent--**When a motion is not likely to be opposed, the chairperson says, "If there is no objection ..." The membership shows agreement by their silence; however, if one member says, "I object," the item must be put to a vote.
- **By division--**This is a slight verification of a voice vote. It does not require a count unless the chairman so desires. Members raise their hands or stand.

- **By ballot**--Members write their vote on a slip of paper; this method is used when secrecy is desired. There are two other motions that are commonly used that relate to voting.
- **Motion to table**--This motion is often used in the attempt to "kill" a motion. The option is always present, however, to "take from the table", for reconsideration by the membership.
- **Motion to postpone indefinitely**--This is often used as a means of parliamentary strategy and allows opponents of motion to test their strength without an actual vote being taken. Also, debate is once again open on the main motion.

Parliamentary procedure is the best way to get things done at your meetings. It will only work, however, if you use it properly. Remember to:

- Allow motions that are in order.
- Have members obtain the floor properly.
- Speak clearly and concisely.
- Obey the rules of debate.
- Most importantly, BE COURTEOUS.

*Sources: AFT national rep Bob Brown, Robert's Rules of Order Newly Revised, Robert's Rules of Order Web site ([www.robertsrules.com](http://www.robertsrules.com))*



## **AWS Section Tool Kit**

Local Sections are the very heart and foundation of AWS and are, therefore, very important to the wellbeing and future of the Society. The Section Toolkit contains a wide variety of information designed to assist Sections in the organization and operations of day-to-day activities. Section Officers will find "how-to" manuals, as well as useful templates for a variety of letters, award certificates, and for recording meeting minutes. Know the purpose and importance of District Conferences, and why your Section should be represented. Get ideas for upcoming meetings and events from Section Success Stories, compiled from attendees who have participated in past Leadership Symposiums, and much more.

The Section Tool Kit is located on the Section page on the AWS website at [www.aws.org/Community-and-Events/Sections-and-Student-Chapters/Section-Toolkit](http://www.aws.org/Community-and-Events/Sections-and-Student-Chapters/Section-Toolkit).

If you have a suggestion on what to add to the Kit, or if your Section uses a template that would be helpful to other Sections, please contact the Member Services Director.