Chapter and Affiliate Handbook

Organizing and Managing Regional
Translator and Interpreter Groups

Updated October 2013

Dear Chapter and Affiliate group leaders,

Thank you for volunteering! You are the liaison between ATA and local translators all over the US. You have the opportunity to develop the knowledge of the translation and interpretation profession, both among local businesses and organizations, but also among fellow colleagues. You are a valuable resource to the ATA.

Before you dive in head first into the chapter activities, please take some time to read this handbook. It will answer many questions you may have about how to manage local chapters, the relationship to ATA and help you avoid some rookie mistakes.

Most important, as you embark on your term as a member of a local chapter board, please know that you are not alone. The members of the Chapter Committee, as well as your counterparts in the other chapters and affiliate groups are always there to help. They probably have had similar questions and might have a good answer.

Once again, thanks for volunteering! We look forward to working with you to spread the knowledge of the translation and interpretation business in every corner of the US and to provide a local resource for translators and interpreters.

Regards,

The Chapter Committee

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INTRODUCTION

Purpose of the Handbook

The purpose of this Handbook is to support the work of ATA's existing regional groups as well as to encourage the formation of new ones. It has been compiled for ATA's chapters and affiliates by the ATA Chapters Committee, based on the Committee's accumulated experience in working with existing and newly-formed groups. All groups are encouraged to send their suggestions for the Handbook to the Chapters Committee.

Chapters Committee Mission Statement

Regional ATA groups of translation and interpretation professionals are the grass roots organizations that give a face to our professions on a local level. These chapters and affiliates are the channels for membership growth, they reflect the myriad facets of the industry, and they perpetuate the association's vitality between annual conferences. The mission of the Chapters Committee is to serve ATA members by creating, developing, and supporting regional groups of T&I professionals. The mission is being met, in a general sense, through the Committee's availability as a source of pertinent and relevant information, its work as the liaison between the regional groups and the ATA Board of Directors, and in facilitating growth within the groups through the specific activities listed below.

The Chapters Committee hopes to continue to fulfill its mission and be of assistance to you.

The Chapters Committee:

- provides assistance to ATA members interested in establishing regional groups;
- provides a focal point for information and assistance to regional groups;
- serves as the liaison between the groups and the ATA Board of Directors;
- assists affiliates through the process of becoming a chapter, so they can gain additional benefit from their association with ATA;
- facilitates continuing education and professional development through regional groups in coordination with other ATA Committees;
- advises chapters and affiliates about ATA procedures and policies;
- receives and disseminates the Annual Reports submitted by chapters upon request;
- sponsors the Regional Groups Brainstorming Session at the ATA Annual Conference;
- facilitates communication and cooperation among affiliates/chapters;
- prepares documents for distribution to regional groups; and
- maintains and updates this Handbook.

Forming and maintaining a regional group is a challenging task, and the Chapters Committee is eager to help you succeed. Don't hesitate to call on the Committee or the Chapter and Division Relations Manager at ATA Headquarters for help.

SECTION ONE: RELATIONSHIP TO ATA

1.1 Chapters

Currently, ATA recognizes two types of regional groups: chapter and affiliate. Each has a different set of benefits and responsibilities.

1.1.1 Benefits

- chapters are eligible for an annual 10% dues rebate from ATA (see section 5.2.3);
- chapters are covered by ATA's Directors and Officers Liability insurance and by ATA's insurance covering venues for events;
- chapters may be entitled to support from ATA for legislative actions;
- chapters receive mailing labels from ATA for mailings;
- chapter bylaws may be reviewed by ATA attorney free of charge (see section 3.1);
- chapters are eligible for ATA seed money for conferences;
- chapters are entitled to a free table at ATA Annual Conferences;
- ATA will advertise chapter events free of charge in *The Chronicle* and online; and
- discounted member registration rates for Professional Development Seminars held in Chapter cities.

1.1.2 Responsibilities

- must sign a Letter of Understanding with ATA (see Letter of Understanding in Appendix IX);
- president and vice president must be ATA voting members. Lean about becoming a voting member, here: see http://www.atanet.org/membership/memb_review_online.php
- must submit annual report and yearly financial report;
- must submit bylaws amendments for approval by ATA;
- keep ATA abreast of any local issues of interest to the national organization;
- provide support to ATA if an Annual Conference is held in their sphere of influence;
- promote ATA regional activities and ATA Annual Conferences in their publications; and
- promote benefits of ATA membership to non-ATA members.

For more information on the benefits and responsibilities of chapter status, see Section 5.

1.2 Affiliates

1.2.1 Affiliate benefits

- ATA will advertise affiliates' events free of charge in *The Chronicle* on a space-available basis;
- ATA will advertise affiliates' events free of charge online;
- ATA will provide affiliates with a free table at the ATA Annual Conference; and
- ATA will work with affiliates on issues of mutual concern.

1.2.2 Affiliate responsibilities

Affiliates are asked to:

- submit annual report (strongly encouraged) and yearly financial report (optional);
- keep ATA abreast of any local issues of interest to the national organization;
- provide support to ATA if an Annual Conference is held in their sphere of influence; and

- promote ATA regional activities and ATA Annual Conferences in the affiliate publications and online on a space-available basis.

SECTION TWO: GETTING STARTED

2.1 Why Organize?

Some of the reasons for founding a regional group are to:

- discuss and resolve common concerns;
- publicize the availability of local translators in the business sector;
- provide a forum for information on the profession;
- administer regularly scheduled ATA certification exams;
- produce and maintain regional directories of translators and interpreters;
- increase the community's awareness of the profession;
- organize social activities; and
- organize regional professional conferences and other professional development activities.

2.1.1 How to organize

The formation of a regional group is a challenging undertaking; it requires teamwork and attention to many details. Suggested initial steps are listed below.

2.1.2 Establish an organizing committee

At this early stage of the organization process, a small, informal committee can reach a consensus and act more rapidly than a larger group. The committee members should meet or communicate with each other as often as needed to set up a master plan for a first general meeting and for basic organization of the group.

2.1.3 Compile a list of potential members

- **Define the general geographic boundaries** for the regional group, keeping in mind that it should offer a potential of at least 50 members, although the initial group may be much smaller. Below this threshold, it will be difficult to enlist the volunteers and create the financial base needed to operate the group; by the same token, overextended geographical coverage will make it difficult to assemble the membership for meetings and maintain a sense of community. *Please note: ATA will not accommodate two chapters in one geographical area.*

- **ATA Headquarters can provide mailing labels of ATA members** within your geographic area.

- **Check local advertising resources** (yellow pages of the area's phone books, on-line business listings, etc.) under the headings for translation and interpretation, as well as any other types of businesses where translators might be employed.

- Wherever possible, **follow up by calling potential members** to introduce the committee and its plans, to seek suggestions for meeting sites and topics, and to ask for names and addresses of other potential members.

- **Write a notice for *The Chronicle*,** announcing the committee's intention to form a regional group. Established chapters and other regional groups may well be willing to provide assistance and advice, and translators from outside the initial geographic area may want to become members of the regional group.

- **Compile the list of potential members**, preferably in a database. It will provide the committee with the materials it needs to assess responses and plan further strategies; and when the group is successfully formed, it will serve as the basis for its membership directory. In designing the database, consult some of the larger established groups and draw on their experience.

- **Advise language services companies** that a new regional group is being formed, and ask them to notify their contractors located in your area.

- **Put together a list** of libraries, universities, trade associations, hospital and medical training associations, bookstores, and other businesses where you might be able to publicize the group's formation and attract new members.

2.1.4 Plan the first general meeting

The primary purpose of the first general membership meeting is to present the organization and its goals and to appoint or elect the first Steering Committee or an interim Board of Directors. The meeting should also be aimed at identifying and discussing issues of concern to local translators and interpreters.

- **Location.** Contact a local university, library, or other public facility to inquire about the availability of space, preferably at no cost. If the meeting includes a lunch or dinner, hotels or restaurants may provide meeting space at no charge or for a minimal fee. If the group is likely to be a small one, it can also meet at someone's home. Companies with an interest in translation as well as international clubs or organizations are other resources that may be approached for facilities for a first meeting.

- **Time.** Some chapters meet regularly in the evening, others on weekends. For the first general meeting, the task of the Organizing Committee is simply to schedule a time and place that are as convenient as possible for the potential members, avoiding rush hour traffic for example, or wintry evenings. In general, avoid the summer vacation season and the December/January holiday season as well.

- **Agenda.** Since the purpose of the first meeting is to create an organizational framework, sufficient time must be given to the advantages of forming a regional group and to the basic organizational structure. This should include discussion of various topics such as certification, professional development, and other professional concerns; the audience should be invited to participate and express its views and interests in specific tasks. At this early stage, avoid parliamentary formalities or the designation of committees, and maintain a flexible organizational structure. These matters will not become important or meaningful until the membership grows large enough to provide a pool of volunteers. If possible, a board member from an established chapter or a member of the ATA Chapters Committee could act as facilitator for the discussions.

- Although establishing a regional group is a great incentive in itself, the first meeting can also feature a special attraction in the form of an **interesting speaker**, such as a tax expert, a computer specialist, a speaker knowledgeable on specific aspects of interpretation or translation (e.g., translation tools) and so on.

- **Mailing and publicity.** Attendance at the first meeting will be determined by an announcement mailed or emailed to prospective members and posted in appropriate public places. Above all, the announcement should clearly state the purpose of the organization and the fact that a meeting is being scheduled; it should also contain a list of contact persons, with addresses, phone numbers, and email addresses, for further information. If refreshments or meals are contemplated, an RSVP should be required for planning. In general, announcements should be sent no more than one month, nor less than two weeks, before the meeting. If the list of names is not excessively long, phone reminders will assure higher attendance.

- **Displays, newsletters** from other regional groups, and ATA publications could be displayed for browsing. ATA Headquarters can also supply previous copies of *The Chronicle* available for reading or distribution.

- Use a **sign-in sheet** for the names, e-mail and snail mail addresses, ATA membership status, and areas of interest of those who attend. The information should be entered in the group's database for future membership development.

- **Financial considerations.** Up to this point, the cost of forming a group has been minimal; however, the mailing and other preparations for the meeting will usually require some level of financial outlay. Sources for early organizational support may be found among funds aimed at non-profit organizations, university centers, business associations, and so on. Another alternative is to conduct a workshop and include the cost in the workshop fee. And lastly, contributions may be requested from the recipients of the mailing. Groups may also wish to approach the Chapters Committee for information, advice, and assistance.

- **Hospitality.** Provide nametags to encourage mutual **introductions** and a sense of community; few of those present will know each other. Ask people to introduce themselves, including their languages and areas of specialization; it will afford an idea of the group's diversity and will foster conversation.

- Offer **refreshments** before or at the end of the meeting to create an informal setting for conversation and introductions. Remember that a major cause of dropout in regional groups is the feeling of being unwelcome or uncomfortable in what appears to be an established group of colleagues. Hospitality is a must, and it begins at the first meeting.

- **Other meeting forms.** If it is difficult to arrange a meeting in person there are other means to arrange meetings online. This can be done through Skype, as a group call, where the attendants can also chat and send files to each other at the same time. If the chat feature in Skype is used, the group has an automatic transcript of the meeting. This becomes less practical when the number of attendants is growing (more than 10 seems to be the limit when it becomes less practical). Another option is a conference call. FreeConference.com can accommodate up to 100 people (http://www.freeconference.com/). This is a phone conference option so files such as minutes or handouts would have to be emailed in advance.

2.2 Follow-up after the first meeting

After the first meeting has ended, the organizational momentum must be increased. Once you are aware of the interests and types of program that will appeal to the potential membership, the next step is creation of a formal group structure.

2.3 How the ATA Chapters Committee can help

The Chapters Committee can be of assistance in several ways:

- **Contact and program information.** Copies of the *Annual Reports* submitted by ATA chapters and affiliates are available on request. They include names and addresses of useful contacts in each ATA regional group, as well as a description of all the programs sponsored the previous year. The reports also contain information that will be of use as your group gets organized: they list the committees, terms of office of board members, dues structures, and newsletters and other publications. Above all, they make it possible to contact appropriate people in other chapters for advice and assistance.

- **Listserve.** Join ATA's regional group listserv: ATA Chapters & Groups listserv, http://groups.google.com/group/atachapters.

- **Finding guest speakers.** The Committee can also help locate guest speakers; a member of the Committee may in fact be able to attend your first meeting or other group gatherings.

SECTION THREE: CREATING A FORMAL REGIONAL GROUP STRUCTURE

After the first meeting, the Organizing Committee may wish to dissolve and open the way for a more formal group and structure.

3.1 Bylaws

The group's bylaws (see sample bylaws in Appendix II) will need to define its purposes and structure and determine classes of membership and voting eligibility. The bylaws must also indicate the composition of the group's board of directors and which positions are elective and which are appointed. The board members' terms of office will require careful consideration: some groups opt for one-year terms, based in part on the philosophy that a large number of members should have an opportunity to run for elective office; other groups prefer longer terms, because one-year terms are not sufficiently long to gain experience and become effective, with the result that the same persons often run for reelection on consecutive one-year terms. As a rule, terms of office should be designed to overlap so as to leave some experienced members on the board as new members are elected.

The Chapters Committee can supply copies of the bylaws of other chapters and affiliates and facilitate your contact with those groups; it can also offer information on what is or is not required in the bylaws. The Committee can also discuss points in conflict with the ATA Bylaws in order to make the subsequent transition to chapter or affiliate status as simple and inexpensive as possible.

3.2 Articles of Incorporation

Some regional group have incorporated as 501(c)(6) organizations, and then obtained tax exemption. (For information on incorporation, see Appendix VIII Memo on Incorporation.)

3.3 Dues

- **Expenses.** In establishing the dues structure, the group should consider that overhead costs are not necessarily proportional to the number of members; a small group may have to set relatively high dues to meet inevitable expenses, while a larger group will be able to provide more services for the same dues, once overhead costs are covered. Expenses for membership drives, newsletter and directory publication, publicity, and so on, will be covered largely from dues. Programs, workshops, and regional conferences will generally involve a fee, which will be used to cover costs and, if possible, generate a reasonable surplus to cover expenses for future activities.

- **Regional conditions.** The dues structure should also reflect regional economic and professional conditions. Some groups find free meeting places readily available, while others find that rental may be necessary. Some groups may find they are in a position to seek advertisements in their newsletters or co-sponsorship of events. This too will have a direct impact on the dues structure.

- **Other considerations.** Where there is a large student population, a dues concession for students may be offered. *In addition, some chapters offer lower dues for ATA members as an incentive to join the national association*.

- **How ATA can help.** ATA Headquarters can provide a chapter financial report sample. This report contain useful information on budget line items, as well as on a dues structure.

3.4 Committees and Board functions

Committees can begin their work even before bylaws are approved; they do the essential work of the group, and often consist of a single member of the board. Some boards, perceiving themselves as managerial entities, have replaced the traditional committee concept with a structure modeled along corporate definitions of "Director for...." In either case, you should have a specific idea of what you expect of the person and be certain that the person is aware of your expectations. Ideally, responsibilities for

each position are defined in writing, but permit sufficient leeway for the display of personal talent and the use of new and innovative thinking to achieve the goals.

The following division of labor is suggested:

- **Finance.** This committee generally consists of the organization's Treasurer; it works on the budget, maintains the group's financial records, seeks grants and other funds, and advises the board on financial matters.

- **ATA Certification.** One of the functions of chapters and affiliates is to administer the ATA certification exams. Because the exams must be proctored by ATA-certified translators, it is critical that the committee be headed by or composed of ATA-certified translators. The ATA Certification Committee is responsible for preparing certification policy documents for use by regional groups. For more information, contact ATA Headquarters or go to http://www.atanet.org/certification/.

- **Membership.** The Membership Committee is responsible for receiving membership inquiries and completed application forms; the person or persons composing the committee should also be capable of maintaining the membership database used to produce the group's referral lists and directories.

- **Program.** The group may choose to have one or several persons responsible for planning and organizing membership meetings and programs. Volunteers can also be enrolled to plan various programs associated with their specialties; it is important to plan and publicize the programs well in advance so that attendance will be as great as possible.

- **Publicity.** The Publicity Committee publicizes the group's existence and programs in *The Chronicle,* regional newspapers, social media, and other appropriate venues. The Publicity Committee may also design a group brochure for distribution to area hotels, libraries, and business organizations where a need for translators and interpreters may exist. The most common way to start communicating with members is to create a website with a blog.

- **Records.** This generally falls under a secretary's duties. It is essential to keep complete records: Boards of Directors change every year or two, and it is easy for institutional memory to get lost in the shuffle. The chapter should make sure that there is a central file to include the group's bylaws, complete sets of minutes, and all other important documents and that the files are passed on to successive Boards after elections. One recommendation would be to digitize records and store them centrally in a secure location accessible to board members.

SECTION FOUR: MANAGING REGIONAL GROUPS

Once the group has achieved a formal structure with officers and committees, its operations must be sustained. This can be challenging, since burnout can easily occur among those who have been involved for long periods of time. Efforts need to be made on a number of fronts, including publicity, publications, and most importantly, programs to recruit new members and to create a sense of community among existing members.

4.1 Administration

ATA Group leadership

Google group. The Google group is a continuation of the discussions begun at the Annual Conference with chapter leadership and a great resource for all chapter administrators. Join the discussion group by going to www.googlegroups.com and search for "ATA Chapters & Groups" and send a request to join. The Chapters Committee will approve your membership. Note that it is not limited to the President of your group: many groups have several members of their board or key volunteers join this group as well.

Chapter agreements. Each chapter signs a Letter of Understanding between ATA and the chapter that states the relationship between the association and its chapters, the chapter's responsibilities and expectations, and the Association's responsibilities and expectations. A copy of the Letter of Understanding can be found in Appendix IX.

Office management. While chapters and affiliates are often strapped for funds in their early stages, there is a definite benefit to engaging paid assistance for administrative tasks as soon as is feasible. Hiring a paid administrator has the following advantages:

- Relieves the burden on board members to perform routine administrative tasks
- Represents a non-volunteer individual who is accountable to the board, and therefore likely to be more responsive than a volunteer
- Can be a long-term familiar interface with members, to provide continuity even during changes in the board of directors.

Web site and internet services are also an area that can benefit from paid assistance. In many cases, the speed of updates and quality of presentation can be improved if professional services are engaged. A paid service will also be more responsive to requests than a volunteer who may be overwhelmed with other obligations at any given time. Some chapters even divide webmaster duties between a web design firm and a paid administrator. The design firm performs technical and complicated changes to the site, and maintains the Web presence, while the administrator makes regular small changes and updates to the site. This ensures timely updates and makes it possible to get new information to members quickly.

Reporting. Each year the chapter is required to send in a report of the activities and issues of the chapter to the ATA to keep it informed of any local issues of interest to the national organization.

4.1 Publicity

4.1.1 External resources

Newspapers. Newspaper editors and reporters may omit information about translation and interpretation if they don't know where to put it. Start reading your daily papers with a new purpose in mind: determine which editors and reporters may become useful to you, and where information about your group could be published. Write a news release with that section in mind. Phone calls to or personal meetings with the editors or reporters may help. Watch for or inquire about deadlines.

Other publications. In addition to daily papers, there are regional monthly publications that you can seek out. Other publications are connected with Chambers of Commerce and international or world trade clubs or associations; the publications of the International Business and Trade Administration of the U.S. Department of Commerce Field Offices are another medium which you can approach; so are the in-house publications of international companies, radio stations, and international clubs at universities. In major

urban areas, contact the regional ethnic/foreign language papers. Translators often work informally in the communities they reach. Always keep eyes and ears open to determine who may know whom; with a name, you have won half the game.

Outreach Committee. Many groups have created outreach committees, which conduct public relations on behalf of the profession, but also advocate for their members' interests with large employers and government in their region. In regards to lobbying, note that 501(c)(6) organization, like some ATA chapters, may lobby or advocate for or against legislation to a substantial degree, but political campaign activity may not become the organization's principal activity. Also, "self-defense" is not considered lobbying, so standing up in defense of member interests should not jeopardize the group's tax-exempt status. It is recommended that chapters not get involved in lobbying for specific candidates and propositions (unless the proposition directly affects the translation and interpreting profession). More information on this matter can be found on the IRS website.

4.1.2 Internal resources

Professional services directory. Many regional groups publish their own professional services online directory in order to inform the community about the profession and to make their services available to potential clients. These directories list the qualifications of the group's members but do not assume liability for the quality of their services, generally including a disclaimer to that effect.

Websites. A website is an important part of a regional group's presence. It can be a valuable resource to the local community, especially if it includes a directory of the group's members that is searchable by language, language pair, or language direction. Members should be given access to their profiles in the directory so that they can update them independently as needed. The website can also include a list of links to other translation- and interpretation-related websites; a FAQs page for those interested in translation and interpretation as a career option; an events page; a Board of Directors page listing the directors with their bios and contact links; and a page explaining membership benefits and providing an online application form or link to PayPal for paying or renewing membership dues.

Regional groups can also develop blogs in addition to a website.

Social media networks. Social networks like Facebook, LinkedIn, and Twitter can provide fantastic leverage to groups wishing to spread the word about their events to a wider range of people and organizations. Some regional groups, including the Atlanta Association of Interpreters & Translators (AAIT), have had great success with using Twitter and LinkedIn to announce group events and developments. The group's website and all electronic communications (e-mails, press releases, newsletters) should include links to its Facebook, Twitter, and/or LinkedIn pages.

Regular email notifications. This is an optional publication that has worked well for some groups. The administrator sends a weekly notice to all members. This notice is a compilation of upcoming events, announcements, and other news. This compilation is also a way to reduce the frequency of email announcements, while keeping events and information in front of members. The frequency of the notifications can be adapted to fit your organization.

Newsletter

- **Benefits.** The major publicity and communication resource of regional groups is their newsletter. It is also the single largest expense, so the purpose of the newsletter must be clear. It may be short or long, it may be monthly or quarterly, a newsletter blog or PDF, but it will need to exist. Newly formed groups tend to send complimentary copies of the newsletter to interested parties outside of the organization, for two or three issues (or online access to two or three issues). After that, membership or payment of a subscription will be required. Keep in mind that the newsletter is one of the major incentives for membership, so a few free copies may result in an increase in payments of membership dues or subscriptions. Please note: in your publications, do not include discussions of rates, and matters related thereto, as specified in ATA's Policy Statement of March 25, 1990 (see http://www.atanet.org/bin/view.fpl/13626.html).

- **Editor.** The editor's position is usually filled by a member of the board or a volunteer from the organization, who may or may not be assisted by a committee. Although the position is normally a volunteer one, the group may agree to provide an honorarium to the editor, given all of the work involved in this important task. Some groups choose to have a volunteer editor or editors with a paid production manager to handle desktop publishing, printing, and mailing.

4.2 Programs

4.2.1 Membership meetings

- **Speaker meetings.** Programs can include guest speakers, whether a single speaker or a panel designed around a single topic. For example, one activity that has been popular in virtually all meetings is a discussion between members and a panel of language services company representatives. Guest speakers or panels must be allowed time for questions and answers; some of the most interesting exchanges arise through group participation.

- **Social meetings.** Social events are a normal part of regional group gatherings. Some groups have dinner together after a meeting, others will schedule seasonal events, such as holiday parties, barbecues in the summer, and so on. These events provide an informal opportunity for exchanging ideas, for networking, for recruiting new volunteers, and for meeting each other's partners and families. Here again, newsletters and annual reports from other groups will provide useful suggestions for meetings.

- **Program ideas.** The newsletters and annual reports from other groups provide an invaluable source of ideas for topics and creative programs. Groups occasionally cosponsor meetings with another organization whose interests are translation-related. You will profit from any publicity their meeting receives, and your group may get some mention as a participant. A bank with international departments or a university in your area might consider co-sponsoring one of your meetings. Some companies are almost guaranteed media coverage, and with your information included in theirs, you might get help from their public relations department, especially if one of their managers is your speaker.

4.3 Workshops

4.3.1 Organization

Workshops are the heart of regional group programs; they are also among the most difficult activities to organize. Unless you have had a fair amount of experience in organizing events, have participated in ATA workshops, or have had formal translator training, you should be cautious about embarking on the venture of a translator training workshop until you have operated as a regional group for a while. Many of the sessions at ATA Annual Conferences are organized around the workshop/seminar concept and you would do well to participate in as many as possible to gain insight into their workings. A few of the essential components are outlined below. Educational chapter events (not social ones) automatically qualify for CE credits. Chapters should plan to provide ATA-certified attendees with certificates for their records in case of audit.

- **Program.** Workshop leaders should have in-depth subject and language knowledge. If you are planning a major workshop, we suggest that, at least for your first workshop project, you plan around available leaders: presenters who master their subjects, can capture an audience, and who are willing to speak, either free of charge or at a cost that can be covered by registration fees.

- **Target audience.** After lots of legwork to organize an interesting workshop, nothing could be more frustrating than a poor turnout. From the start, you should have a good idea of who your participants will be. While this may not be a problem in a major metropolitan area with a high concentration of translators, it is considerably more difficult in less populated areas. The larger the size, scope, and appeal of your envisioned workshop, the bigger your mailing list should be. It is also important to decide what level of sophistication you expect in your audience—that will affect the price you should and can charge for the

venture. You may want to be selective and charge a higher price, or provide information to a broader audience.

- **Date.** During school and university vacations, you may only reach 50% of your target audience. Teachers are also busy during examination periods and hard to pry away from their duties. Be aware of religious and federal holidays. In addition, don't schedule any events the same time as the ATA Annual Conference or other ATA events. But do consider events that piggyback on other events coming to town that may draw more attendees (like ATA Professional Development Seminars or other conferences).

- **Money.** Workshops and other professional development programs should not only aim at being self-sustaining, but should **seek to make enough money to cover advance expenses for the next workshop**. Since the objective is to improve the professional performance of the maximum number of participants, special efforts should be made to keep costs reasonable, especially for beginner-oriented sessions.

4.3.2 How ATA can help

Upon recommendation by the Chapters Committee, the Professional Development Committee can provide up to $500 in seed money for educational activities. This is not a grant; the chapter is expected to recover this amount by charging an adequate fee for its activity. If the activity fails to produce the anticipated revenue, the regional group is not liable for the money borrowed. However, if the activity is a success, the group must repay the seed money loan before taking profit.

Both the use of ATA money and the quality of the workshops will be monitored by the Professional Development Committee, which will require a formal proposal including the following information:

- Nature of activity;
- Statement of objective;
- Detailed description of program;
- Site and date of program;
- Target audience; and
- Detailed budget (expenses such as speakers' fees, publicity, mailing, and incidentals; sources of income such as fees to be charged, amount needed from ATA).

This proposal will be sent to the Chapters Committee Chair. If you receive seed money, a detailed final budget, with copies of all receipts attached, must be received by the Professional Development Committee within two months after the program has been held. All ATA chapters are eligible to submit proposals.

4.4 Conferences

The Chapters Committee and ATA Headquarters are eager to provide assistance to all regional groups interested in organizing regional conferences, and organizers of past regional conferences are also willing to support you. Contacting the Chapters Committee Chair for help before you begin the planning process may well save you a lot of effort and headaches. In addition, staying in touch will allow the Chair to track regional events and let organizers know what other events are planned, so that efforts can be coordinated, rather than conflict.

4.4.1 Support from HQ

ATA Headquarters can help you with many organizational tasks. The level of support provided will depend on whether or not an ATA chapter is involved, how much support you need/want, and how available support fits into your overall plan. The Executive Director is available to serve in a general advisory capacity, and his extensive conference planning experience makes his advice invaluable. Look to him for information on planning, catering, facilities, and other nuts-and-bolts issues. There is also the

Chapter and Division Relations Manager who is available when assistance is needed. Listed below are some of the other ways HQ can help.

- **Insurance.** For chapters only, Headquarters can provide an insurance certificate, which is often required by universities or other sites where you may hold your conference or membership meetings. If a venue requires an insurance certificate, the group's president or delegate should contact the Chapter and Division Relations Manager at ATA Headquarters as soon as possible.

- **Mailings.** Headquarters is always willing to make mailing labels of ATA members in your region.

- **Promotion.** *The Chronicle* is a great way to advertise your event to a broad audience at no cost to you. Ideally, announcements or advertisements should appear in several issues and on the ATA Calendar.

4.4.2 Funding

Any ATA chapter may apply for seed money of up to $500 to sponsor a presentation by a speaker included on the list of speakers maintained by the Professional Development Committee. Contact ATA Headquarters or the Professional Development Committee chair for more information.

4.4.3 Guidelines for the ATA Chapter seed money fund for speakers

Background:

ATA's chapters play a key role in the continuing education of their members. Since the chapters vary greatly in number and composition of members, it can be hard for some chapters to offer educational opportunities to all their members. As a service to all its members, and as a benefit of chapterhood, the ATA would like to support these educational efforts by supporting presentations that might otherwise prove to be a financial burden for individual chapters.

1. This fund shall only be available to ATA chapters. Up to $500 may be awarded to each chapter as often as once every two years. Funds will be awarded to invite speakers on suitable topics. ATA encourages chapters to invite speakers who either:

    - Will be of interest to the broadest audience among their members or;
    - Address an underserved audience among their members, such that the fund will serve to make viable presentations that would otherwise not be economically feasible.

2. Chapters are responsible for choosing speakers, negotiating with them, developing a balanced budget (the event income must balance with the event expenses), and then presenting a seed money application (including the budget) to ATA Headquarters **at least four weeks before the event**. They are encouraged to choose from among the pre-approved speakers list maintained by the PDC, as any such request supported by a reasonable budget will be approved by the Committee.

3. Seed money funds may be applied to speakers' expenses and/or fees to cover facility expenses. They may be requested in advance (and must be paid back if the event results in a profit) or may be in the form of a reimbursement up to $500 of documented expenses if the event incurs a loss.

4. Chapters that receive seed money are asked to include the statement "presented by the American Translators Association and <chapter name>" in all advertising for and reporting on the event.

5. Within two weeks after the event has taken place, the chapter is required to complete a financial report including all expenses and revenues. That report is to be sent to ATA Headquarters along with a check, up to the amount of the entire seed money advance. If there is a net loss, no funds need to be repaid to ATA.

SECTION FIVE: CHAPTER STATUS

5.1 Applying for Chapter status

Article XII of the ATA Bylaws defines chapters and their relationship to ATA. Please read that portion of the bylaws (see Appendix I) carefully before proceeding. The steps to chapter status are outlined below.

- **Make sure your chapter membership includes at least 20 voting members of ATA.** As previously noted, presidents and vice presidents of ATA chapters must also be voting members of ATA. If it is not certain that the group has 20 voting members of the ATA, a list of the group's membership can be sent to ATA Headquarters for verification against ATA's membership database.

- **Submit bylaws to ATA Headquarters for review.** The group must have its own bylaws. They must be compatible with the ATA Bylaws. You may request sample bylaws from other groups as models (see Appendix II). The bylaws must include the following:

  - Mission statement/objectives and rules that do not contradict those in the ATA Bylaws..

  - Your bylaws must stipulate that the president and vice president (or the equivalent two top leadership positions) of your chapter must be voting members of ATA. If your president or vice-president are not voting members of ATA, please contact Headquarters immediately to begin a peer review process for them.

  - Explicit definitions of membership categories, voting requirements, and eligibility criteria for directors.

- **Hold a referendum.** Should the group wish to become a chapter, the voting members of that group must approve a referendum in favor of ATA chapter status. Following the voting provisions of your bylaws, conduct an election to determine if there is majority support for your application for ATA Chapter status.

Prepare a petition. Before applying for chapter status, the group must provide a Petition for Chapter Status signed by at least 20 voting members of ATA. The petitioning members must reside or work in the group's geographic area, even though other members of the group may reside elsewhere. The petitioners **must also state that they are voting members of ATA**. Individual petitioners may sign separate petitions, or collectively sign a single petition. Send the petition and the following information to the ATA Chapter and Division Relations manager

- **Compile a membership list.** The petition for chapter status must be accompanied by a list of the group's membership, including each member's name, address, and ATA membership status.

- **Provide other information.** It is also helpful to enclose sample newsletters, a financial statement, and any other useful information that will demonstrate the viability of the group.

Approval process. The completed petition, bylaws, and membership list should be forwarded to ATA Headquarters, which will verify that the group's bylaws are consistent with the ATA Bylaws and that all the formalities have been observed. Note that the ATA Board usually meets in January, April, July, and at the Annual Conference; the process will advance more quickly if you plan with this schedule in mind.

You will be informed of the Board's decision.

5.2 Responsibilities and benefits of Chapter status

5.2.1 Annual report and financial report

At the end of each year, the Chapters Committee sends an Annual Report form to each chapter and affiliate. The filing deadline is May 1of the following year. These reports are required by ATA's insurer to allow us to extend liability and venue insurance to a chapter. The Committee also compiles all the reports and sends them, on request, to each contributing group to allow them to gain from each other's experience. These reports contain useful information on budget line items and cost per member, as well as on the dues structure of the various groups.

5.2.2 ATA Annual conference activities

5.2.2.1 Annual regional groups training session

A Regional Groups Brainstorming Session is held at each ATA Annual Conference, providing an opportunity to discuss common interests and concerns. Each group is invited to send a representative who can speak for the group. The Chapters Committee Chair heads the meeting.

5.2.2.2 Chapter and affiliate tables at the ATA Annual conference

Every chapter and affiliate is offered a free table at the ATA Annual Conference to display materials about the chapter. This provides great visibility about your chapter to potential members in your area. Please plan to have a rotation of members (breaks, lunch) available at key times to answer questions and refresh materials. Past experience with "unmanned" tables shows that they often become a dumping ground for coffee cups and business cards from people seeking work. Please also be aware that any display items (signage, promotional materials) tend to disappear from unattended tables. If you lack volunteers from your own chapter, consider coordinating with another chapter to help share table maintenance.

5.2.2.3 Chapter hosting of ATA Annual conference

If an ATA conference will be held in a city in the geographical area served by your chapter or affiliate, you will have a special responsibility and opportunity. Conference attendees have come to rely on the "local" information and flavor that the host group provides, and groups report a significant increase in interest and membership from the increased exposure. The Conference Organizer (President-elect) will establish contact with you about two years before the conference you are hosting, and will have a clear list of focused tasks for your group to take on.

5.2.3 Dues rebate

How it works. One of the benefits of chapter status is eligibility for a dues rebate from ATA. Upon paying their ATA dues, chapter members *who are also members of ATA* may instruct the national association to pay a 10% dues rebate to the chapter of their choice. *Rebates cannot be granted to more than one chapter.* ATA members who belong to more than one chapter must select **one** rebate recipient on their renewal forms. *Rebates are issued based on the previous year's membership*, regardless of whether the member renewed his or her ATA membership for the year in which the rebate is actually paid. The request for rebate with required paperwork must be received by May 1 of the following year. In addition, there must be a signed Letter of Understanding on file or a rebate will not be issued.

Getting your rebate. Submit a membership list to ATA Headquarters along with your Annual Report, a copy of the chapter's bylaws, and the financial statement by the May 1 deadline. Headquarters will tabulate the number of members who have checked the rebate box for your chapter on their renewal form, calculate the amount of their dues and issue your chapter a check for 10% of the total.

5.2.3 Legal considerations

Even though chapters are autonomous organizations, the granting of a chapter charter by ATA creates a special relationship whereby the actions of the chapter can reflect on ATA, and in certain cases expose both your chapter and ATA to legal liability for chapter actions. In this context, there are several issues that must be taken into consideration on an ongoing basis.

5.2.3.1 ATA policy on rates

Antitrust laws make unlawful any agreements among competitors that directly or indirectly restrain competition, including agreements among competitors which directly or indirectly affect prices. Gathering and publishing of information on competitive rates charged by translators must be performed under procedures intended to ensure that the information gathered and published is impartial and objective and does not encourage the setting of rates. ATA intends to comply with such procedures in the dissemination of any rate information.

ATA intends to comply strictly with antitrust laws and all other laws that affect ATA. The Association requires that its Divisions and Chapters comply strictly with those laws. It is essential that ATA, its Divisions and Chapters, and its members ensure that activities comply with antitrust laws. The purpose of this policy statement is to focus on antitrust compliance.

ATA members must follow these guidelines:

- Avoid actions which create a risk of antitrust violations.
- Bear in mind that discussions among members regarding translation rates, rate levels, future rate expectations, rate projections, or any other matters which may affect translation rates can create a risk of antitrust violations. Do not circulate written statements, comments, suggestions, or views regarding any matters which may affect translation rates, and do not make public announcements or statements on those matters.
- Matters that affect rates or restrain competition among members should not be discussed at meetings.
- Consult with counsel on any question which might have competitive or antitrust implications.

Finally, this Policy Statement is intended to highlight antitrust issues affecting ATA and its members. It does not answer all questions which may arise under the antitrust laws. ATA urges that members who have antitrust questions consult legal counsel.

As Adopted by the ATA Board of Directors March 25, 1990

5.2.3.2 Publications and liability

All written statements included in your newsletter, on your Website, in your electronic broadcasts— including any picture or sign—must be carefully reviewed before release. Please be sure that statements are factual and that there is written evidence to support facts. This is especially important when any material may seem to be in any way defamatory. If a published statement is defamatory and false, the statement
may be considered libel. This can have serious repercussions, exposing both your group and ATA to legal action. If a piece is an opinion piece or a commentary, it must be labeled as such.

If you have any doubts regarding a statement, please feel free to check with ATA Executive Director, Walter Bacak, before publishing it. He can be reached at (703) 683-6100, ext. 3006, or mooch@atanet.org.

5.2.3.3 ATA elections and endorsements

The ATA Elections Policy adopted January 30, 2011, states that "Chapters of ATA are encouraged to refrain from making endorsements and to observe an equal space policy." This is an extension of the expectation of the Association that leaders and employees of the Association are to maintain neutrality in ATA elections.

5.2.3.4 Directors and Officers Liability insurance

Chapter officers and directors are covered by ATA's Directors and Officers Liability insurance policy.

5.2.3.5 Bylaws revisions

During the life of a chapter, bylaws are invariably subject to revisions. Please be sure to submit any bylaws revisions to ATA Headquarters for review in advance of your elections. It is important to identify any potential points in conflict with the ATA Bylaws before your chapter adopts them.

5.3 Change of status

5.3.1 Inactive chapter status

A chapter may be declared inactive by the ATA Board of Directors when it has not had any activity for a period of 12 months, as evidenced by:

- no meetings held;
- no newsletters published;
- disconnected phone/website;
- no communications with the Chapters Committee;
- no apparent leadership; and
- non-adherence to the terms of the Letter of Understanding.

In the event a chapter is declared inactive by the ATA Board, ATA encourages that chapter funds be remitted to the ATA Treasurer to be held in reserve, and that chapter records be forwarded to ATA Headquarters unless the chapter's bylaws prohibit this.

If a chapter resumes activity and demonstrates viability during the period of inactive status, it can reapply for chapter status, and sign a new Letter of Understanding. One way to show revived activity may be to submit a report to the ATA Chapters Committee Chair (similar to the annual report). When the chapter is granted active status, any funds held in reserve by ATA will be returned (principal only) along with chapter records. If the chapter has not been reorganized or revived after two years of inactive status, any funds held by ATA will revert to ATA and the chapter charter will be permanently revoked.

5.3.2 Dissolution

Chapter members may vote to dissolve their chapter. In addition, the ATA Board may vote to revoke a chapter's charter by a two-thirds vote if the chapter's activities are deemed to run counter to the established policies, objectives, or good name of the Association.

APPENDICES