



I²SL Chapter Kit  
**A Guide for Creating an I²SL Chapter**  
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## Table of Contents

About I²SL.....	3
I²SL’s Mission Statement.....	3
Why Start an I²SL Chapter.....	4
Chapter Benefits.....	4
Chapter Structure.....	5
Chapter Requirements.....	5
Reporting.....	5
Payments.....	6
Representing I²SL.....	8
Chapter Administration.....	8
Starting an I²SL Chapter.....	9
How to Become Chartered as an I²SL Chapter.....	10
Dissolving an I²SL Chapter.....	11

## About I<sup>2</sup>SL

The International Institute for Sustainable Laboratories (I<sup>2</sup>SL<sup>®</sup>) is a 501(c)(3) nonprofit professional organization that specializes in training and education, research through international and industry collaboration, and technical assistance to help improve the energy and environmental sustainability of laboratories and related high-technology facilities worldwide. I<sup>2</sup>SL provides a global forum for information exchange to foster international cooperation in creating and maintaining more sustainable laboratories and other high-tech facilities that accommodate the rapid pace of science, medicine, research, and development in an ever-changing and dynamic world.

Incorporated in Washington, DC, in 2005, I<sup>2</sup>SL is headquartered in Luray, Virginia, USA. I<sup>2</sup>SL Headquarters (I<sup>2</sup>SL HQ) maintains a growing network of thousands of individuals representing hundreds of companies from around the world.

### I<sup>2</sup>SL's Mission Statement

I<sup>2</sup>SL's mission is to:

- Promote resource-effective and environmentally-responsible facilities for science education, testing, medicine, and research and development through advanced and sustainable design, engineering, and operational practices.
- Encourage the development of technologically advanced, energy-efficient, and environmentally-responsive laboratories and related high-tech facilities throughout the world.
- Facilitate a sustainable "whole-building" and systems integration approach in designing, engineering, constructing, and operating laboratories and other advanced facilities.

With its mission rooted in the goals of the Laboratories for the 21st Century (Labs21<sup>®</sup>) program, I<sup>2</sup>SL was selected to be the official cosponsor of the Labs21 Annual Conference and Workshops. By leveraging this responsibility, I<sup>2</sup>SL HQ now facilitates a network of technical capabilities to address global needs in the following areas while incorporating a whole-building approach to sustainable, high-tech, and low-energy laboratories. These capabilities include:

- Providing infrastructure assessments
- Offering project-specific technical assistance and charettes
- Sharing new technologies through customized training and workshops
- Developing case studies and best practices

# Why Start an I<sup>2</sup>SL Chapter

I<sup>2</sup>SL seeks individual leaders and organizations to share in the rewards of creating and promoting more sustainable laboratories and other high-tech facilities worldwide by becoming I<sup>2</sup>SL Chapters. Organizations interested in starting an I<sup>2</sup>SL Chapter will commit to use contacts, events, and other resources within the chapter area of activities to promote the mission and activities consistent with those of I<sup>2</sup>SL HQ.

## Chapter Benefits

- Permission to be branded as an I<sup>2</sup>SL Chapter.
- Exclusive use of the registered trademark I<sup>2</sup>SL logo with the chapter name beneath it upon acceptance of the chapter charter by I<sup>2</sup>SL's Board of Directors.
  - I<sup>2</sup>SL will provide logo use guidelines with the chapter logo that the chapter must honor.
- Use of the I<sup>2</sup>SL HQ mailing list of contacts that exist within the chapter's area of activities.
- Dedicated page on the I<sup>2</sup>SL website where information provided by the chapter, including its activities, is posted with a link to the chapter website, once available.
- A dedicated @i2sl.org email address that only the chapter will have access to.
- Chapter recognition in I<sup>2</sup>SL's *Sustainable Laboratory Times* newsletter.
- Access to I<sup>2</sup>SL accounting services, including procedures to receive the benefits associated with I<sup>2</sup>SL's 501(c)(3) tax-exempt status. (*This benefit does not apply to chapters located outside of the United States.*)
  - I<sup>2</sup>SL will collect, bank, and distribute funds upon request from the chapter.
    - I<sup>2</sup>SL will not be responsible for ensuring sufficient chapter operating funds. This responsibility lies specifically with the chapter's Board of Directors.

Upon request, I<sup>2</sup>SL HQ offers the chapter the following services at an additional, to be determined, cost:

- Access to I<sup>2</sup>SL's workshops as a revenue sharing opportunity. Workshops will be offered upon request and taught by an I<sup>2</sup>SL-approved instructor.
- Early assistance in planning an I<sup>2</sup>SLChapter event. I<sup>2</sup>SL would participate in one kick-off meeting during which I<sup>2</sup>SL would provide the chapter with logistical guidance for organizing and promoting the event.
- Manage registration for chapter events.
- Access and ability to share with chapter members any materials I<sup>2</sup>SL maintains.

# Chapter Structure

An I<sup>2</sup>SL Chapter may operate under the 501(c)(3) tax “umbrella” of the headquarters organization or as an independent 501(c)(3) organization. **I<sup>2</sup>SL HQ will assume all chapters (except international chapters) will operate under the I<sup>2</sup>SL HQ tax umbrella throughout the first year of the chapter’s charter.**

Chapters operating under I<sup>2</sup>SL HQ’s tax umbrella may avoid substantial costs associated with incorporation, annual reporting to the Internal Revenue Service, and necessary insurance fees. If operating under the I<sup>2</sup>SL HQ tax umbrella, a chapter will receive accounting services from I<sup>2</sup>SL HQ for an annual maintenance fee to be billed in the second and subsequent years of the chapter. Chapters operating under I<sup>2</sup>SL’s umbrella will be accountable to I<sup>2</sup>SL HQ for all financial transactions it undertakes once the chapter charter is approved. Chapters may pursue incorporation and obtain a tax exemption status at any time.

International chapters are not responsible for U.S. tax reporting but might have their own country’s laws and regulations to satisfy. The chapter, not I<sup>2</sup>SL, is responsible for meeting such obligations. I<sup>2</sup>SL will not include tax-related services in international [chapter annual fees](#).

# Chapter Requirements

## Reporting

- Submit to I<sup>2</sup>SL, as requested below, the following required documents:
  - [Chapter Event Report Form](#). This form must be used by I<sup>2</sup>SL Chapters operating under the “umbrella” of I<sup>2</sup>SL HQ’s 501(c)(3) tax status and will be due within 30 days of a chapter event for which sponsorships were received, funds were collected, and/or expenses were paid. *This form is not required of chapters operating as their own incorporated 501(c)(3) organization or international chapters.*
  - Reports of Nomination and Election of Chapter Board of Directors. Each chapter is required to elect officers that include a president, vice president, and treasurer. Other members (e.g., secretary, membership chair) may be elected as the chapter sees fit. It shall be the duty of the chapter officers to furnish the I<sup>2</sup>SL Board of Directors a complete list of the elected Board of Directors (i.e., officers and members) as elections are completed. The chapter’s inaugural officers should commit to managing and guiding the chapter through its critical first three years. I<sup>2</sup>SL encourages chapters to ensure professional diversity among its Board of Directors.

- Chapter Meeting Minutes and Promotional Messages, Newsletters, and Publications. A signed copy of chapter meeting minutes should be submitted to I<sup>2</sup>SL HQ within two weeks of their occurrence. Chapter newsletters or publications must be previewed by I<sup>2</sup>SL HQ two weeks prior to their issuance.
- Activity Reports. From time to time the I<sup>2</sup>SL HQ Board of Directors may request reports on chapter activities. A reasonable time will be negotiated for submitting any requested report.

## Payments

- Remit payment to I<sup>2</sup>SL as follows (Note: I<sup>2</sup>SL reserves the right to adjust fees to adequately cover services offered, but it will give chapters at least 60 days notice before any adjustments are made):
  - \$1,600 Start-Up Fee. All chapters are required to make an initial, one-time payment to I<sup>2</sup>SL HQ within two months of chapter charter approval. This fee will cover accounting, insurances, and logistics support as described in the Chapter Benefits section. International chapters will have a reduced initial fee of \$1,200.
  - 10% of non-membership gross revenues. A chapter is a franchise of I<sup>2</sup>SL HQ and as such the chapter has purchased rights and privileges to information and branding developed by I<sup>2</sup>SL HQ. I<sup>2</sup>SL HQ must recover costs associated with the creation and management of these shared activities, including but not limited to updates to the chapter's Web page on I<sup>2</sup>SL's site, maintenance of mailing lists, processing and managing American Institute of Architects (AIA) credits, and proofing materials. Therefore each chapter will be required to pay I<sup>2</sup>SL HQ 10% of the organization's non-membership gross revenues as calculated at year end given the following:
    - Non-membership chapter revenues are defined to include conference registrations fees (individual and corporate), training revenues, and chapter sponsorships, to name a few. Revenue from chapter membership dues will not be considered when deducting the 10% gross revenues.
    - Exempted from the 10% payments are government and educational grants received by the chapter as well as donations received strictly for student scholarships.
    - A minimum of \$300 is required to be submitted to I<sup>2</sup>SL HQ for organizations that earn less than \$3,000 in gross revenues during a

given fiscal year.

- Chapters that are approved after October 1 are not subject to this fee until their next operating year. A chapter's operating year begins on the date the chapter received official approval from I<sup>2</sup>SL HQ's Board of Directors.
- **\$900 Annual Accounting Fee.** This fee is to be paid by chapters operating under I<sup>2</sup>SL HQ's tax umbrella. This fee will cover accounting services I<sup>2</sup>SL HQ must undertake in reporting the full income of I<sup>2</sup>SL, including that received from the chapter, so that the chapter can be exempted under I<sup>2</sup>SL's 501(c)(3) status. *Not applicable to 501(c)(3) chapters that have been incorporated for the full fiscal year or international chapters.*
  - Chapters operating under I<sup>2</sup>SL HQ's tax exempt status are encouraged to have all revenues deposited to I<sup>2</sup>SL HQ's bank account for distribution to the chapter as requested. This process will be developed between the chapter and I<sup>2</sup>SL HQ on a case-by-case basis.
  - This fee will be invoiced by I<sup>2</sup>SL HQ at the beginning of the chapter's second operating year. A chapter's operating year begins on the date the chapter received official approval from I<sup>2</sup>SL HQ's Board of Directors.

Figure 1. I<sup>2</sup>SL Chapter Fee Chart

Fee	To Be Paid	Cost to Chapter
<b>Chapter Start Up Fee</b>	One-time fee to be paid within 2 months of receiving acceptance as an I <sup>2</sup> SL Chapter	\$1,600 \$1,200 for international chapters
<b>Chapter Annual Operation Fee (including international chapters)</b>	Annual fee to be paid upon invoice from I <sup>2</sup> SL HQ at close of I <sup>2</sup> SL's fiscal year. <i>Chapters that are approved after October 1 are not subject to this fee until year*.</i>	10% of Chapter Gross Revenue (minimum \$300)
<b>Chapter Annual Accounting Fee</b> <i>Not applicable to incorporated, 501(c)(3) chapters or international chapters.</i>	Annual fee to be paid upon invoice from I <sup>2</sup> SL HQ at beginning of the Chapter's second operating year*.	\$900
* A chapter's operating year begins on the date the chapter received official approval from I <sup>2</sup> SL HQ's Board of Directors.		

## Representing I<sup>2</sup>SL

- Accurately represent I<sup>2</sup>SL by following I<sup>2</sup>SL's logo use guidelines and employing its mission statement.
  - No chapter or any member of the chapter shall enter into any contracts with others in the name of I<sup>2</sup>SL or use the name of I<sup>2</sup>SL in marketing of products or services to others without the written consent of chapter officers and the I<sup>2</sup>SL HQ Board of Directors.
- Share with I<sup>2</sup>SL HQ any technical training materials, case studies, best practices, tools, and other technical documents created by the chapter (these materials will need to be reviewed by I<sup>2</sup>SL in advance of publication) for promotion and use by others. The chapter may request reimbursement for I<sup>2</sup>SL HQ use of these materials.
- Promote the I<sup>2</sup>SL Annual Conference.
- Promote I<sup>2</sup>SL workshops, webinars, and other training opportunities as appropriate.

## Chapter Administration

- Invite a member of I<sup>2</sup>SL HQ Board of Directors to present and participate in at least one chapter meeting annually and conferences or programs organized by the chapter. The attendance of an I<sup>2</sup>SL HQ Board of Directors' member will depend on I<sup>2</sup>SL funds. Chapters can elect to pay for travel costs to ensure the attendance of a Board of Directors member.
- Schedule regular chapter meetings to conduct chapter business.
- Consider developing chapter-specific bylaws. [I<sup>2</sup>SL HQ's bylaws](#) are available as an example.
- Notify I<sup>2</sup>SL HQ in writing at least two months before the chapter desires to undertake any I<sup>2</sup>SL Chapter activities that involve revenue sharing, including but not limited to offering I<sup>2</sup>SL workshops, holding a country/regional/city conference, or using any I<sup>2</sup>SL tools that may require I<sup>2</sup>SL HQ support.
- Ensure that all chapter members are I<sup>2</sup>SL HQ Members in good standing. Chapter members may join directly through I<sup>2</sup>SL HQ's website at [www.i2sl.org/globalcommunity/members.html](http://www.i2sl.org/globalcommunity/members.html) so chapters need not collect and remit membership fee payment to I<sup>2</sup>SL HQ.



- Chapters must achieve and maintain approximately 25 members on an annual basis. I<sup>2</sup>SL encourages chapters to ensure professional diversity among its members.
- Chapters may establish their own chapter member fee to support its activities. These fees shall be collected directly by the chapter.

## Starting an I<sup>2</sup>SL Chapter

The following steps must be completed in order to start an I<sup>2</sup>SL Chapter:

1. Contact [info@i2sl.org](mailto:info@i2sl.org) if you have read this Chapter Kit and are a “leader” with a history of involvement with Labs21 and I<sup>2</sup>SL to express your interest in forming a chapter in your country, region, or city.
2. Schedule an informal meeting with known colleagues in the region that share a similar interest in forming an I<sup>2</sup>SL Chapter.
  - a. These colleagues and other interested individuals should be familiar with I<sup>2</sup>SL and have a commitment to support organization of an I<sup>2</sup>SL Chapter. The group of chapter start-up members should include a balance of public- and private-sector professionals spanning laboratory and related high-tech facility designers, engineers, industrial hygienists, owners, and manufacturers.
3. Schedule a second meeting of the initial interested contacts and others within the region.
4. Develop an announcement about this second meeting, and send the announcement to [info@i2sl.org](mailto:info@i2sl.org) for input. I<sup>2</sup>SL will provide a list of contacts within the region to which chapters can send the announcement.
5. Hold the second meeting. Items to be covered in this meeting include:
  - a. Review of I<sup>2</sup>SL’s Chapter Kit
  - b. Group’s acceptance of I<sup>2</sup>SL HQ and chapter membership requirements
    - i. I<sup>2</sup>SL’s Mission and Purpose
    - ii. Chapter benefits
    - iii. Chapter responsibilities
    - iv. Selection of I<sup>2</sup>SL Chapter Officers (i.e., President, Vice President, and Treasurer)
    - v. Discussion, approval, and signatures on Chapter Charter Application, including Petition and Agreement
      1. A minimum of 10 members (including officers) must be signatories on the petition. All of these members must be I<sup>2</sup>SL HQ Members in good standing at the time the petition is received

- c. Determine whether and when the chapter will file for incorporation and 501(c)(3) tax status (*not applicable to chapters outside of the United States*).
6. Submit the completed [Chapter Charter Application](#) to [philwirdzek@i2sl.org](mailto:philwirdzek@i2sl.org). Upon written approval from I<sup>2</sup>SL HQ (given within 30 days of receipt of the completed Chapter Charter Application), begin soliciting chapter members and sponsors and introduce them to the concept and purpose of the chapter to increase chapter membership and collect seed funding to support chapter activities.

## How to Become Chartered as an I<sup>2</sup>SL Chapter

In order for a chapter to be chartered, a completed [Chapter Charter Application](#) must be completed and submitted to I<sup>2</sup>SL HQ. A completed Chapter Charter Application will include a:

1. Contact list of the chapter's founding Board of Directors Officers
2. Petition for chapter charter, including confirmed I<sup>2</sup>SL membership by all signers
3. Signed Chapter Agreement

All materials should be submitted to I<sup>2</sup>SL HQ at:

I<sup>2</sup>SL

c/o Philip J. Wirdzek, Founding President and Executive Director  
[philwirdzek@i2sl.org](mailto:philwirdzek@i2sl.org)

I<sup>2</sup>SL HQ's approval of a chapter charter will be conditional on applications that exhibit the following:

- A strong and representative membership that declares support for the new chapter.
- A Board of Directors (minimum president, vice president, and treasurer) that agrees to manage and guide the chapter through its critical first three years.
- A well-conceived program and financial plan to maintain the function and activities of the chapter.

I<sup>2</sup>SL HQ will review Chapter Charter Applications and provide the charter applicants acceptance or rejection of the charter within 30 days of receipt of the Chapter Charter Application. I<sup>2</sup>SL HQ will formally recognize all new chapters during the I<sup>2</sup>SL Annual Conference.

## **Dissolving an I<sup>2</sup>SL Chapter**

Chapters wishing to be dissolved must provide a written notice signed by the elected president. A letter of dissolution will be provided by I<sup>2</sup>SL HQ that requires the signature of all current chapter officers on behalf of the chapter's membership. In addition to notifying I<sup>2</sup>SL of its intent to dissolve, an incorporated chapter must dissolve itself on its own and in accordance with applicable federal, state, and local requirements. Note that Chapter dissolution does not impact chapter members' status as I<sup>2</sup>SL HQ Members.