



Association of Biomolecular Resource Facilities

Business Office:

9650 Rockville Pike, Bethesda, MD 20814

Tel: (301) 634-7306 ♦ Fax: (301) 634-7455 ♦ E-mail: abrf@abrf.org

ABRF Affiliates and Chapters Operating Procedures

Table of Contents

Mission Statement of ABRF Chapters and Affiliates

- 1. ABRF Affiliates and Chapters Committee**
- 2. ABRF Chapters**
 - 2.1 Overview
 - 2.2 Benefits of becoming a Chapter
 - 2.3 Examples of Chapter activities
 - 2.4 Considerations in forming a Chapter
 - 2.5 Applying to become a Chapter
 - 2.6 Responsibilities of ABRF Chapters
 - 2.6.1 Support of the ABRF and furthering of the mission of ABRF
 - 2.6.2 Financial and legal requirements
 - 2.6.2.1 Conformity with ABRF bylaws
 - 2.6.2.2 Management of Chapter finances
 - 2.6.3 Chapter meetings and other events
 - 2.6.4 Annual Chapter reports
 - 2.7 Remaining in good standing
 - 2.8 Dissolution of Chapter status
- 3. ABRF Support of Chapters**
 - 3.1 ABRF support of Chapter events
 - 3.1.1 Event planning
 - 3.1.2 ABRF infrastructure support for Chapter meeting management
 - 3.1.3 Financing Chapter events
 - 3.1.4 Insurance
 - 3.1.4.1 General Liability Insurance
 - 3.1.4.2 Directors and Officers Insurance
 - 3.1.5 Chapter reports of meetings and other events
- 4. ABRF Affiliates**
 - 4.1 Overview
 - 4.2 Creation of an Affiliate
 - 4.3 Responsibilities of Affiliates
 - 4.4 ABRF Support of Affiliates
 - 4.5 Use of ABRF Logo by Affiliates
 - 4.6 Dissolution of Affiliate status

ABRF Affiliates and Chapters Operating Procedures

Mission Statement of ABRF Chapters and Affiliates

The mission of the ABRF is to advance life sciences core facilities and biotechnology laboratories through research, communication, and education. To facilitate this mission, the ABRF has implemented ABRF Affiliates and Chapters and the ABRF Affiliates and Chapters Committee for the following purposes:

- To encourage the establishment, support the operations, and facilitate the coordination of new regional and special interest groups that have goals related to those of the ABRF in support of life sciences shared resources.
- To establish partnerships and collaborate with other existing organizations that have goals related to those of the ABRF in support of life sciences shared resources.
- To promote the technologies, research support and administration of biomolecular resource facilities.
- To promote the development and applications of biotechnologies as shared research resources and to facilitate the advancement of life sciences research.
- To play a leadership role in networking core laboratories, researchers, and students, matching those with similar and complementary interests and skills.
- To enhance communication on the regional, national and international level regarding ABRF activities; to enhance the visibility of the ABRF in the scientific community; to educate the scientific community about the value of the ABRF; and to broaden the number and diversity of core laboratories and biotechnology laboratories that take advantage of the ABRF research group studies and ABRF membership networking opportunities.
- To enhance the visibility of the ABRF with funding agencies that support the development, acquisition and application of core facility shared research resources.

1. ABRF Affiliates and Chapters Committee

- 1.1** The ABRF Affiliates and Chapters Committee (ACC) is a standing committee of ABRF charged with administering the relationship between the ABRF and its Affiliates and Chapters. This includes but is not limited to: assessing applications to form new ABRF Chapters or Affiliates; periodically reviewing the status of existing Affiliates and Chapters; coordinating support for Affiliates and Chapters; facilitating communication and coordination among Chapters, among Affiliates, among Chapters and Affiliates, and among Chapters and Affiliates and the ABRF; and responding to requests from Affiliates and Chapters.
- 1.2** All recommendations and actions by the ACC are subject to review and approval by the ABRF Executive Board (EB).

2. ABRF Chapters

2.1 Overview

ABRF Chapters are special interest groups which may be formed based on common interests and/or geographical boundaries and support grassroots networks of individuals who wish to help advance ABRF goals and promote the mission of shared resource facilities and biomolecular resources.

Chapters facilitate an exchange of information and expertise that helps support and advance members' careers and professional development. They foster connections that enable people to discuss and address the continuing challenges associated with the operation of shared research resources and technologies.

Chapters help communicate to the ABRF the needs of the Chapter members related to shared research resources and provide a conduit for communicating both the activities and the value of the ABRF to a broad range of core facilities and biotechnology laboratories and to current and potential future members of the ABRF.

2.2 Benefits of becoming a Chapter

ABRF Chapter members may leverage access to the ABRF community to identify colleagues with similar interests on a local, national or international level. ABRF Chapters may utilize established infrastructure within the ABRF to help develop and plan Chapter activities and events. Members of newly formed Chapters may seek advice from experienced colleagues who have previously organized similar events. Regional Chapters may provide opportunities for local networking with colleagues. Special interest Chapter events may provide an environment that facilitates interaction among participants. Chapter membership may facilitate career advancement by providing networking with experts in many areas, including technology, administration, and policy-making. Chapters help advance and strengthen the overall mission of the ABRF of promoting research, communication and education within the life sciences community.

2.3 Examples of Chapter activities

There are many possible types of Chapter activities. They may range in scope from web-based video conferences to Chapter-focused Wiki sites to regional conference meetings. Chapters may utilize electronic discussion forums to exchange communications on a topic of interest. Chapters may create Chapter-focused web pages devoted to the dissemination of information on a particular area of interest. A Chapter may host a workshop on a local level or work with the ABRF and the organizers of the ABRF annual meeting to host workshops on a national or international level. The opportunities are boundless and creative approaches and proposals are welcomed. Above all, Chapter activities and events must ultimately serve to educate, inform and support the

advancement of its members, be consistent with the goals of the ABRF, and be conducted in coordination with the ABRF.

Chapters are encouraged to submit articles regarding Chapter events in ABRF publications such as the Journal of Biomolecular Techniques and the ABRF Newsletter. Chapters are also encouraged to submit abstracts describing Chapter activities for oral and/or poster presentations at the annual ABRF meeting.

2.4 Considerations in forming a Chapter

Evaluation of applications to become an ABRF Chapter should include assessment of the potential for significant membership and participation in the proposed geographical region or area of interest. Including surveys of potential interested participants may be useful in this type of evaluation. Applications to become an ABRF Chapter should indicate if there are existing Chapters that have overlaps with the newly proposed Chapter, either regionally or in theme. For example, the proposed members of a “technology-focused” Chapter may also be members of several “regional” Chapters. Overlaps in membership or other overlaps between existing and proposed Chapters are acceptable, so long as potential overlaps are addressed in the application and sufficient justification is given to support the formation of a new Chapter. It is important that each Chapter has sufficient participation to help maintain its vitality, relevance and usefulness.

The ABRF recognizes that there may be unique challenges in establishing Chapters that are based outside of the USA. Groups that are based outside of the USA are strongly encouraged to collaborate with the ACC in establishing appropriate guidelines for Chapters in their particular country or region.

2.5 Applying to become a Chapter

2.5.1 The potential officers of a proposed Chapter should submit an application to the ABRF Affiliates and Chapters Committee (ACC), detailing goals, history, organizing committee, area(s) of interest, general geographic boundaries, possible meetings and other events, financial plans, concerns, and current ties with the ABRF. The ACC will review the application and may request an interview with the proposed Chapter’s organizing group to discuss the Chapter’s goals and plans. The ACC will then submit a recommendation to the ABRF Executive Board (EB) for final approval. The decision to grant ABRF Chapter status is made by the ABRF EB.

2.5.2 A Chapter must define an internal organizational structure with a minimum of two officers: Chair/President and Secretary/Treasurer as defined in the ABRF bylaws. Officer positions should be reviewed and renewed on an annual basis. These two officers of the Chapter must be current ABRF members.

- 2.5.3** Each Chapter must provide a liaison to the ABRF ACC. The liaison may be any member of the Chapter, but must also be a current member of the ABRF.

Chapter President's duties include but are not limited to:

- a) Working with Chapter members to set priorities and goals, develop budgets, and implement Chapter operating plans.
- b) Leading and developing Chapter organizational meetings.
- c) Overseeing Chapter operations to ensure necessary tasks are accomplished.
- d) Selecting the Chapter's liaison with the ACC.
- e) Acting as the spokesperson for the Chapter.

Chapter Secretary/Treasurer's duties include but are not limited to:

- a) Maintaining the Chapter's financial records.
- b) Reporting financial information to Chapter officers, members and the ACC via the Chapter liaison.
- c) Preparing operating budgets and monitoring spending.
- d) Collecting sponsorship revenues and monitoring event registration fees.
- e) Managing accounts payable and accounts receivable in cooperation with ABRF Accounting services.

Chapter liaison duties include but are not limited to:

- a) Serving as the Chapter's primary contact with the ABRF.
- b) Facilitating communication between the Chapter and the ABRF ACC.
- c) Participating on conference calls with the ACC when requested by the Chapter or by the ACC.

2.6 Responsibilities of ABRF Chapters

The responsibilities of Chapters include: promotion and support of the ABRF mission; an expectation of professional conduct; and strict adherence to financial and legal requirements.

2.6.1 Support of the ABRF and furthering of the mission of ABRF

An important goal of the ABRF is to develop and maintain a mutually beneficial and supportive relationship with all of its Chapters. This dynamic relationship serves to promote research, education and communication in the shared research resource community.

Each Chapter should foster the interests, issues and developments that are important to the Chapter's community, while also supporting the ABRF's overarching initiatives, mission, and ideals. ABRF Chapters should complement

and support the goals and activities of the ABRF and should not duplicate or compete with the ABRF.

Chapters should work to raise the visibility of the ABRF within their membership and promote the mission of the ABRF organization. Chapters should strive to recruit new members to the ABRF and contribute to the growing community of ABRF supporters. This may include, but is not limited to:

- a) Hosting of an ABRF speaker at regional events.
- b) Distribution of ABRF membership materials at Chapter events or on Chapter websites.
- c) Providing ABRF booths, tables or posters at Chapter events.
- d) Communication of appropriate ABRF news to Chapter members.

The ABRF logo and a link to the ABRF website should always be included in marketing material distributed by Chapters, including Chapter websites.

2.6.2 Financial and legal requirements

2.6.2.1 Conformity with ABRF bylaws

Chapters must comply with all of the terms and provisions of ABRF bylaws, available on the ABRF website. All designated Chapters are official entities of the ABRF, are responsible to the Association and shall adhere to the ABRF bylaws and other governing policies and procedures.

2.6.2.2 Management of Chapter finances

The ABRF will create a financial account for each Chapter that is based in the USA, through the ABRF Business Office. This agency account will be separate from other ABRF accounts. In order to effectively conform to audit requirements associated with the non-profit status of the ABRF and the US government IRS regulatory mandates related to the use of ABRF merchant accounts, all Chapters based in the USA may only hold financial assets within, and conduct financial transactions through, its ABRF agency account.

Rules for financial management of Chapters based outside the USA will be determined on a case-by-case basis, will be in compliance with the regulatory mandates for non-profit organizations in the country where the Chapter is based, and will be specified in a Memorandum of Understanding (MOU) that will be agreed upon by all interested parties.

Chapters must provide financial statement summaries to the ABRF, through the ACC, on an annual basis. Detailed Chapter financial statements will be provided

by Chapter Officers to the ABRF, within a reasonable timeframe, following requests at any time by the ABRF.

If a Chapter hosts a meeting or other event that is supported in any part by the ABRF Business Office infrastructure, a proposed financial and operational plan for the meeting or other event must be submitted to the ACC within a reasonable time for review before the meeting. In addition, a follow-up financial and operational report of the meeting or other event must be submitted to the ACC within a reasonable time after the meeting. This report must include numbers of attendees, mailing contact lists of attendees, meeting agenda and content, sponsorship sources and levels, and a reconciled final budget.

Chapters are solely responsible for their financial accountability. The ABRF acts only as a subcontractor of the Chapters' officers to provide accounting support for transactions. The ABRF will not be responsible for any deficits incurred, nor for any financial or business obligations of a Chapter that are not each explicitly approved by the ABRF Executive Board in writing.

Requests for the ABRF to be responsible for any financial or business obligations of a Chapter should be submitted to the ACC. The ACC will review all such requests and send them with a recommendation for final action to the ABRF Executive Board (EB) for approval. The decision for the ABRF to be responsible for any financial or business obligations of a Chapter is made by the ABRF EB.

Chapters based in the USA will direct their own finances in compliance with USA laws and guidelines for non-profit agencies. Chapters based in other countries will direct their own finances in compliance with the laws and guidelines for non-profit agencies in their countries.

2.6.3 Chapter meetings and other events

Chapters are required to submit a preliminary budget to the ABRF ACC for any Chapter meetings or other events. Chapters are normally expected to obtain non-ABRF support for most or all event expenses. Chapters may request ABRF support to cover some event expenses or choose to have an event without ABRF support. If a Chapter holds an event without ABRF support, it must follow the same financial, reporting and scheduling rules as when having an event with ABRF support. Anticipated sponsorships and registration fees must be enough to cover or exceed any budgeted expenses for the event.

Chapter meetings and other major events should not be scheduled to directly conflict with the schedule of the ABRF annual meeting. Whenever possible,

Chapter meetings and major events should be held at least two months prior or after the ABRF annual meeting. Chapters may request to host a meeting or workshop or other event at the ABRF annual meeting.

2.6.4 Annual Chapter reports

Each Chapter must submit an annual report describing its yearly efforts and initiatives. These annual reports are submitted to the ACC and are reviewed by the ACC and the ABRF EB. Chapter annual reports provide a detailed summary of Chapter activities, including any articles submitted to either the ABRF Journal of Biomolecular Techniques or the ABRF Newsletter, and copies of any Chapter newsletters or website content. Reports should indicate what Chapter events were supported in any part by the ABRF Business Office infrastructure. A financial and operational report of all Chapter events should be included in the annual Chapter report.

2.7 Remaining in good standing

Chapters are expected to remain active, demonstrating consistent efforts that further the goals of the Chapters and the ABRF. An active Chapter, for example, might do any of the following:

- a) Host an annual meeting or sponsor comparable event(s).
- b) Conduct periodic conference calls or web-based conferences.
- c) Maintain active websites or discussion forums.
- d) Publish articles related to the Chapter activities or special interests in ABRF publications such as the Journal of Biomolecular Techniques or the ABRF Newsletter.

To stay in good standing as an ABRF Chapter, all Chapter events must comply with the guidelines for ABRF Chapters and should complement and support the goals and activities of the ABRF and should not duplicate or compete with the ABRF.

2.8 Dissolution of Chapter status

- a) A Chapter status may dissolve via two officers of the Chapter notifying the ACC.
- b) The ACC may recommend to the ABRF EB that the ABRF either put a Chapter on probation status or dissolve Chapter status due to inactivity or for activities not in compliance with Chapter guidelines or ABRF bylaws. Final decisions regarding the ABRF putting a Chapter on probation status or dissolving a Chapter are made by the ABRF EB.

3. ABRF support of Chapters

The ABRF support of its Chapters is a significant investment on the part of the ABRF towards the organization's goal of supporting and advancing life sciences shared resource core facilities and biotechnology laboratories. The ABRF provides various levels of administrative and technical support to ABRF Chapters, which may include but are not limited to any of the following, depending upon the nature of a Chapter's activities:

- a) Administrative support for Chapter meetings, including the use of ABRF business infrastructure and agency accounts (see Section 3.1).
- b) Hosting websites that describe Chapter events and activities. Website and marketing content are the sole responsibility of the Chapter and should appropriately reflect the Chapter's relationship with the ABRF. All hosted content is subject to review by the ABRF.
- c) Providing listserv/discussion forum capabilities.
- d) Marketing support of Chapter activities and events, including notifying ABRF members within a Chapter's region of upcoming events and highlighting Chapters activities on the ABRF website and in the ABRF Newsletter.
- e) Access to on-line databases for managing Chapter membership lists and recruiting new members.
- f) Online survey support (e.g., post-meeting surveys).

3.1 ABRF support of Chapter events

Chapters must send the ACC a description of any planned Chapter event in a reasonable time before the event. This description should include the goals of the event, a list of the members of the organizing committee, proposed venue for the event, anticipated attendance, sources of sponsorships and a preliminary budget. Chapter events do not need the prior approval of the ACC or the ABRF EB to take place, but notification and descriptions of all Chapter events must be submitted to the ACC within a reasonable time before the events. The ACC will provide feedback to the Chapters regarding any suggestions or concerns about their events.

3.1.1 Event planning

The ACC will provide assistance for administering and managing Chapter meetings including guidelines on budget preparation, food and housing allowances, advertising and marketing, and general operations. In addition, members of ABRF Chapters that have hosted meetings will be available for advice. Upon request, the ACC will also provide assistance in identifying potential speakers for Chapter meetings.

3.1.2 ABRF infrastructure support for Chapter meeting and other event management

The ABRF will provide agency accounts for the management of Chapter funds. In addition, financial management assistance through the ABRF Business Office may be also provided, upon request, in support of ABRF-sponsored Chapter events. Upon request to the ACC, with the approval of the EB, the ABRF will not charge a Chapter for the operating and management expenses incurred by the ABRF for supporting a Chapter meeting or other event. Once a Chapter is well established, it is expected that normally the Chapter will reimburse the ABRF for the operating and management expenses incurred by the ABRF for supporting a Chapter meeting or other event. Options for ABRF assistance for ABRF Chapter meeting and other event management may include:

- a) Hosting of a dedicated Chapter meeting or other event website.
- b) Online handling of event registrations; collection of registration fees; credit card processing; confirmation of registration and payment.
- c) Accounts payable: processing of third-party invoices; reimbursement requests for meeting speakers and organizers.
- d) Accounts receivable: invoicing of meeting sponsors.

3.1.3 Financing Chapter events

Chapters are normally expected to obtain non-ABRF support for most or all meeting expenses in addition to any requested ABRF support. Other possible sources of funding for Chapter meetings include, but are not limited to:

- a) Academic institutional support.
- b) Corporate support.
- c) Registration fees.
- d) Federal grant support for meetings.
- e) Support from groups outside of the ABRF that are aligned with the mission of the Chapter.

3.1.4 Insurance

3.1.4.1 General Liability Insurance:

Chapters have the option, on a case by case basis, to purchase general liability insurance through the ABRF for a Chapter event. General liability insurance is limited to personal injury, property, and premises liability and is secondary to the liability provided by the facility where the meeting is held. General liability insurance does not include meeting cancellation insurance.

3.1.4.2 Directors and Officers Insurance:

Directors and Officers liability insurance may also be extended to the duly-elected current officers of an ABRF Chapter who are designated ABRF officers. This insurance will typically be extended to the Chair/President and Secretary/Treasurer of a Chapter, without charge to the officers or Chapter.

3.1.5 Chapter reports of meetings and other events

A summary report of all Chapter meetings and other events should be submitted to the ACC within a reasonable time after the events. These reports should include numbers of attendees, attendee contact information list, meeting agenda and content, sponsorship levels, and a reconciled final budget.

4. ABRF Affiliates

4.1 Overview

ABRF Affiliates are special interest organizations that are autonomous from the ABRF, have common and complementary interests with the ABRF, and have the goal of developing a collaborative relationship with the ABRF. Affiliates may be newly established organizations that are founded with the support of the ABRF under the Chapter and Affiliates initiative but are otherwise independent of the ABRF, or they may be fully independent organizations, established outside of the ABRF, either recent or long-established. Affiliates may collaborate with the ABRF on joint marketing efforts, joint meetings, or other activities that jointly support their memberships.

4.2 Creation of an Affiliate

Representatives of a potential Affiliate should submit an application to the ABRF Affiliates and Chapters Committee (ACC) detailing goals, history, organizing committee, area(s) of interest, general geographic boundaries, possible meetings and other events, concerns, and current relationship with the ABRF. The ACC will then submit a recommendation to the ABRF Executive Board (EB) for final approval. The decision to grant ABRF Affiliate status is made by the ABRF EB.

4.3 Responsibilities of Affiliates

An important goal of the ABRF is to develop and maintain a mutually beneficial and supportive relationship with all of its Affiliates. This dynamic relationship serves to promote research, education and communication in the shared research resource community.

Each Affiliate should foster the interests, issues and developments that are important to the Affiliate's community, while also supporting the ABRF's initiatives, mission, and ideals. ABRF

Affiliates should complement and support the goals and activities of the ABRF and should not duplicate or compete with the ABRF.

The ABRF and its Affiliates should work to raise each other's visibility within their membership and educate their memberships about their missions. This may include, but is not limited to:

- a) Hosting of ABRF speakers at Affiliate events and hosting Affiliate speakers at ABRF events.
- b) Distribution of each other's membership materials at each other's events and websites.
- c) Providing booths, tables or posters at each other's events.
- d) Communication of appropriate ABRF news to Affiliate members and appropriate Affiliate news to ABRF members.

Affiliates are expected to remain active, demonstrating consistent efforts in collaboration with the ABRF that further the goals of both the Affiliates and the ABRF.

Each Affiliate must provide a liaison to the ABRF ACC. The liaison may be any member of the Affiliate, but must also be a current member of the ABRF. Responsibilities of the liaison will include participating on conference calls with the ACC when requested by the Affiliate or by the ACC.

Each Affiliate organization should submit an annual summary report to the ABRF ACC, describing its yearly efforts and initiatives related to its ABRF Affiliate status. If an Affiliate hosts a meeting or event that is supported in any part by the ABRF Business Office infrastructure, a report of the meeting or event should be included in the annual Affiliate report.

As independent organizations, Affiliates are responsible for their own financial and legal operation; no implied financial or legal ties to ABRF may be made without written approval from the ABRF Executive Board. Requests for the ABRF to be responsible for any financial or business obligations of an Affiliate should be submitted to the ACC. The ACC will review all such requests and send them with a recommendation to the ABRF Executive Board (EB). The decision for the ABRF to be responsible for any financial or business obligations of an Affiliate is made by the ABRF EB.

Affiliates based in the USA will direct their own finances in compliance with USA laws and guidelines. Affiliates based in other countries will direct their own finances in compliance with the laws and guidelines in their countries.

4.4 ABRF Support of Affiliates

The ABRF may provide technical support to ABRF Affiliates, including hosting web pages, online survey support (e.g., post-meeting surveys), access to on-line databases for managing Affiliates'

membership lists and for recruiting new members, and providing listserv capabilities. In all cases, content is subject to review by ABRF but is the sole responsibility of the Affiliate.

ABRF can provide marketing support of Affiliate activities and events, such as notifying ABRF members within an Affiliate's region of upcoming events; Affiliates can provide reciprocal marketing of ABRF activities and events.

Additional types of ABRF support for Affiliates may be available upon request.

4.5 Use of ABRF logo by Affiliates

Duly-constituted Affiliates may use the ABRF logo in marketing of joint activities and in general descriptions of their relationships with other organizations. The ABRF logo and a link to the ABRF website should be included in all joint marketing material generated by the Affiliate, including the Affiliate website.

4.6 Dissolution of Affiliate status

- a) An Affiliate status may be dissolved via officers from the Affiliate organization notifying the ACC.
- b) The ACC may recommend to the ABRF EB that the ABRF put on probation or dissolve an Affiliate's status due to inactivity or for activities not in compliance with Affiliate guidelines or ABRF bylaws. Final decisions regarding the ABRF putting an Affiliate on probation or dissolving an Affiliate's status are made by the ABRF EB.