



**American Nuclear Society**  
Local Sections Committee

# Local Section Chair's Manual

Provided by the Local Sections Committee

Revised January 2019

## FOREWORD

The Local Sections Management Guidebook is a comprehensive collection of documents that are designed to provide requirements, reference information, and other necessary guidance for the formation and operation of Local Sections of the American Nuclear Society. The Guidebook is provided in an electronic format so that Local Sections can easily duplicate and distribute materials of interest to various committee chairs for distribution within each section. Local Sections Guidebook consists of the following:

- [Local Section Chair's Manual](#) - This “roadmap” provides the requirements for Local Sections as defined by ANS national, explains where additional information can be obtained, provides reproducible forms to assist in interfacing with ANS national, and provides a storage medium for key documents developed by the Local Section to provide continuity for Local Section leaders. This manual is designed to be a concise reference for key materials, not a repository for general correspondence or other information.
- [Local Section Treasurer's Manual](#) - Provides detailed information needed for Federal Tax reporting, including relevant IRS publications, forms, and instructions. This manual is referenced from summary-level material in the Local Section Chair's Manual.
- [Local Section Membership Manual](#) - Provides ANS guidance on membership planning, recruiting, and retaining Local Section members as well as information and applications for recruiting members for ANS national.
- [Topical Meeting Manual](#) - This online manual created by the ANS National Program Committee, provides detailed requirements and guidance related to planning, sponsoring, and running topical meetings. Local Sections play a key part in supporting topical meetings.

The Local Section Guidebook has been developed and revised by experienced past and present Local Sections Committee members in collaboration with ANS national. In defining the organization and content of the Guidebook (and companion manuals), a key priority is to assure that turnover of section officers and committee chairs will not cause the section to falter.

Due to the diversity of Local Sections in terms of size, location, and members' professional affiliations, an effort has been made to confine the content of the manual to materials of need and interest to all sections. Individual Local Sections are encouraged to adapt their portion of their manual to individual section needs and are encouraged to share their experiences through various forums provided by ANS national, such as [ANS Collaborate](#), Local Section Workshops, and through participation in the Local Sections Committee snap-shot calls.

Suggestions for changes to the Guidebook can be submitted to the ANS national Local Sections Staff Liaison or through the Local Sections Committee.

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## MESSAGE TO NEW CHAIR

This chair's manual provides you with general information, office training, instructions/procedures, and previous officer experience. This manual is a living document which means that you will be expected to add to it. During your term, it is expected that you will develop your own Best Practices including Lessons Learned in an effort to expand this manual for your successor. The objective is to transfer as much information, ideas, and experience to future officers as possible.

Most importantly, you need to recognize that you have complete control over your office. This independence provides you with the flexibility to run your office as you see fit and to reinvent the office as needed. Because of this, great ideas will be produced and equally great mistakes will be made. By documenting your successes and failures, mistakes will only happen once while great ideas will continue year after year. Make sure to transfer as much information, ideas, and experience as you can through this handbook.

At the end of your term, it is up to you to tweak, retrofit, and/or redesign your office, its duties, and procedures so that future officers do not have to suffer the same inefficiencies that you might have experienced. Take pride in your work and consider yourself a contributing author to this publication.

Once again, congratulations.

# 1.0 INTRODUCTION

## 1.1 ANS Structure

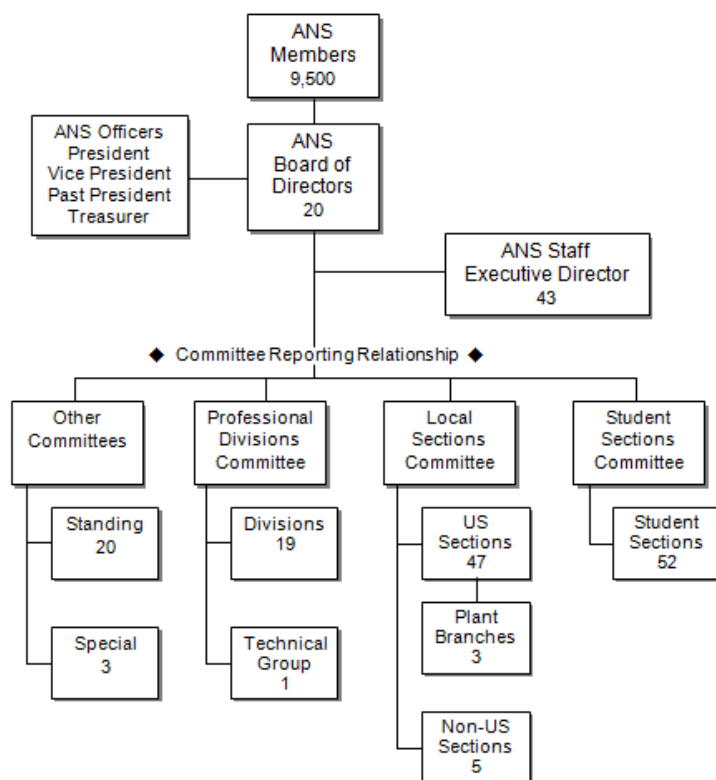
For over 60 years, the American Nuclear Society has been the premier society for nuclear professionals. Our individual membership ranks include more than 9,500 engineers, scientists, educators, students, and others with nuclear related interests. Our members hail from more than 1,600 corporations, educational institutions, and government agencies from over 40 different countries. More than 80 industry-leading companies support the ANS as Organization Members.

ANS, a not-for-profit society, provides extensive opportunities for every professional group in the nuclear field to interact effectively via 20 divisions and technical groups, 47 local sections, 3 plant branches, and 52 student sections.

The Society serves as an advocate for individuals and organizations having a stake in nuclear science and technology. Our Washington, D.C. office acts as a technical resource to senior policy and decision makers. ANS produces position papers on nuclear science and technology issues of our times, publishing these in print and online.

According to the [ANS Strategic Plan](#) the mission of ANS is to *advance, foster, and spur the development and application of nuclear science, engineering, and technology to benefit society.*

### Organizational Chart



January 2019

## 1.2 Local Section Objective and Goals

Local Sections are grouped into five geographical regions ([see Appendix B for a list of sections in each region](#)). The objective of each Local Section shall be to further the mission and goals of the Society in its locality.

### **The Goals of ANS Local Sections are as follows:**

- Promote ANS products, programs and services, including Society membership.
- Support ANS public policy activities at the state and local levels.
- Provide information to the public on the benefits of nuclear science and technology.
- Facilitate the sharing of information among nuclear professionals on the local level.
- Create networking opportunities for nuclear professionals on the local level.

Local Sections should align their programming with the objectives in the [ANS Strategic Plan](#).

In order to be recognized as an official section of ANS, sections must meet the following requirements:

- Have at least 20 active ANS members (required to start a section)
- Have elected officers. The chair and vice-chair must be ANS members.
- Have adopted the Standard Bylaws for Local Sections on file with ANS HQ.
- Host at least two (2) meetings per calendar year. One must be the section's annual meeting.

## 1.3 ANS Bylaws and Rules

ANS has Bylaws and Rules that govern the establishment, operation, and other activities of various units of the Society, including Local Sections. The Bylaws and Rules in part describe:

- activities of the Society that directly or indirectly affect local sections, and
- activities and responsibilities of the local sections

The full version of the ANS Bylaws and Rules are accessible online: [Bylaws and Rules – updated November 2018](#)

**[APPENDIX A: ANS NATIONAL BYLAWS AND RULES](#)** provides excerpts from the ANS Bylaws and Rules that are relevant to local sections.

## 1.4 Developing Section Bylaws and Rules

The portions of the ANS Bylaws and Rules that dictate responsibilities and activities of local sections are incorporated into the [Standard Bylaws for Local Sections](#). The standard bylaws were developed by the Society's Bylaws and Rules Committee and Local Sections Committee, and were approved by the Society the ANS Board of Directors in November 2001. Latest revision was September 8, 2016. Each local section is required to adopt the Standard Bylaws for Local Sections within 6

months of obtaining a charter and incorporate any updates as they are established. Sections that do not adopt the Standard Bylaws will not be in good standing.

[Download the Local Section Bylaws and Rules Template](#) and edit the section's name in Bylaws. The Bylaws have to be adopted as written, however sections are free to create rules as they seem fit.

Once your Executive Committee adopts the Bylaws, submit the final version to ANS HQ at [governance@ans.org](mailto:governance@ans.org).

#### *1.4.1 Establishing Section Rules*

The authority for Local Sections to establish Rules for handling Section affairs is set forth in *ANS Rule R17- Local Sections*. As an integral and necessary part of the Bylaw change process approved by the ANS Board of Directors in November 2001, local sections must develop Rules to govern the day-to-day operations and activities of the Section. Once the Local Section Rules are established they must be reviewed by the Society Bylaws and Rules Committee for consistency with Society Bylaws and Rules.

[APPENDIX C: SAMPLE BYLAWS AND RULES FOR SECTIONS](#) provides samples of how a few sections have adapted their own rules.

#### *1.4.2 Revising Section Rules*

Occasionally, it is necessary for sections to change their rules to reflect practices unique to the section or to incorporate new provisions of the Society Standard Bylaws. Section rules should include provisions for changing the rules themselves. Whatever change mechanism is selected, proposed rule changes must be reviewed by the Society Bylaw and Rules Committee for consistency with Society Bylaws and Rules.

To submit rules for review and approval, email your document with tracked changes to [governance@ans.org](mailto:governance@ans.org)

### **1.5 Establishing Your Leadership Team**

Whether you are in the first stages of structuring your section or are simply looking for new ideas on revitalizing your leadership team, a sound structure can ensure your section will meet its goals while giving more members an opportunity to get more involved. Your section should continually strive for a leadership structure that enables it to carry out its business in an efficient manner while providing for continuity of leadership.

After your section's structure has been determined, formal written descriptions for each position should be implemented. The best place to start is by asking last year's leadership to document their duties and the required time commitment in an end of the year report.

Written position descriptions will cut down on confusion, ensure that all duties will be



completed and establish accountability.

**APPENDIX D: RESPONSIBILITY OF SECTION OFFICERS, EXECUTIVE COMMITTEE AND COMMITTEE CHAIRS** provides a summary of typical responsibilities of section offices. This information is useful for discussing responsibilities with prospective nominees for various positions and to assist the chair in delegating responsibility. Sections should use this to develop their own job descriptions based on the unique needs of the section. Position descriptions should be reviewed annually to ensure that they are current.

#### **1.5.1 Section Leadership Position Requirements**

Although each position is different, all section leaders must meet the following requirements:

1. Chairs and Vice Chairs must be a current ANS member at the time of application and throughout the term of office.
2. Must demonstrate dedication to ANS mission and objectives and be willing to effectively execute the duties and responsibilities of the position.
3. Must be able to attend all required meetings.
4. Must submit an application for the position by the established deadline as defined in your section's bylaws and rules.
5. Must be able to function effectively in a team environment and to accomplish assignments by working cooperatively with others.

#### **1.5.2 Selection of Officers**

There are a variety of election and appointment procedures in use at sections. Your Section's rules should document how and when leaders will be elected or appointed to ensure truth in voting procedures and to establish continuity from year to year. Please note that the Executive Committee (chair, vice-chair, treasurer and secretary) must be elected. Committee chairs and members can be appointed.

- Your section rules should answer the following questions:
- Who has the authority to appoint leaders?
- How will votes be counted and what type of majority will be required?
- How will ballots be distributed to ensure that non-members do not vote?
- What are candidates required to submit to apply for positions?
- Will there be candidate interviews or speeches?
- How will candidates be notified of the election results?

Elected leaders are generally chosen via secret ballot. Some sections require a letter of Intent (bio) from all candidates to publish with the ballot.

Your section's rules should also have procedures for removing non-performing leaders from office and filling vacancies. For example, your procedures to remove a leader from office may include a letter of petition or a two-thirds vote by the membership

### **1.6 Plant Branches of a Local Section**

Branches of a section may be established by the executive committee of the section to conduct the activities of the section at nuclear power plants or other facilities or at other geographic locations where there may be a group of section members or participants. It

is important for the local section to make proper organizational and financial arrangements when starting up a branch (i.e., modify Section Rules). Article R4 (Membership) in the [Standard Bylaws for Local Sections](#) provides some guidance for organizing a branch under the Local Section organizational structure.

[APPENDIX E: HOW TO FORM A LOCAL SECTION PLANT BRANCH](#) provides guidance on how to form a local section plant branch and additional information on the dynamics of how the partnership works together.

## 1.7 Local Section Sponsorship of Topical Meetings

Local Sections may sponsor a topical meeting or may provide local support to an ANS Division-sponsored topical meeting. There are a number of requirements set forth by the Society to be followed by section running a topical meeting which are described in full in the [ANS Topical Meeting Manual](#).

[APPENDIX G](#) provides guidelines on obtaining sponsorship for a Topical Meeting.

## 1.8 ANS Graphic Standards and Limitation of Authority

[Society Bylaws B9.4](#) defines the authority that a local section has responsibility to represent the ANS.

*No action, obligation, or expression of a constituent unit shall be considered an action, obligation, or expression of the Society as a whole. Any publication issued by a constituent unit shall be imprinted with a statement that the constituent unit assumes sole responsibility regarding an action, obligation, or expression with respect to the Society*

The Society has developed a set of [graphic standards](#) that must be followed by every constituent unit, including Local Sections. ANS provides each section with logos which must be used on all section communications. Samples of how other sections have used the branding guide in their materials can be found in the Local Section Committee library on ANS Collaborate in the [“ANS Branding/Admin” folder](#).

### SAMPLE LOGOS



**American Nuclear Society**  
Idaho Section



**ANS** Washington DC Section

If you are not sure if your materials meet the graphic standards or you need assistance with developing communication materials, contact ANS HQ at [governance@ans.org](mailto:governance@ans.org).

## 1.9 ANS National Candidate Nominations from Local Sections

Local sections wishing to nominate candidates for the ANS Board of Directors or any ANS office may do so by having the section chair submit a nomination to the National Nominating Committee prior the **August 15** of year. If additional candidates beyond those chosen by the National Nominating Committee are desired, the section may submit a petition for each candidate to the Society's Executive Director.

Nomination forms are sent to section chairs from ANS HQ each year.

## 1.10 ANS Standing Committee Nominations from Local Sections

Local Section officers should encourage members to volunteer to serve on national committees. ANS members interested in participating on a committee and making their voice heard should complete the [Committee Volunteer Form](#) online or contact [governance@ans.org](mailto:governance@ans.org) for a form.

Committee chairs review the submissions each Spring before making appointments in June.

## 1.11 Annual Report and Section Standing

As required by the Society's Bylaws and Rules, local sections are required to submit an annual report each year to ANS national. The Local Sections Committee developed an [Annual Report Workbook](#) to keep the reporting consistent between sections. The Excel template consists of tabs for:

- Section Management
- Membership Information
- Communication
- Speaker Meetings
- Other Meetings & Programs
- Public Information & Education
- Scholarship & Awards
- Financial Information

In order to be considered for the Local Section Meritorious Award, the annual report must be submitted by **August 1**. Per the Standard LS Bylaws and Rules, sections have until August 31 to submit. Sections that do not submit a report each year will not be in [good standing](#).

Reports should be sent to the Local Sections Committee staff liaison at [governance@ans.org](mailto:governance@ans.org).

**The Local Sections Committee developed the following status categories:**

**Good Standing**

A section is considered to be in good standing if they have completed the following:

1. adopted the standard bylaws and rules (only has to be completed once)
2. submitted an annual report in the current year
3. updated officer information
4. hosted at least one outreach event

**Active**

A section is considered to be active if they have filed an annual report at least once in last 3 years (Annual Report includes officer info).

**Inactive**

A section is considered to be inactive if they *lack one or more* of the following:

1. identifiable or active leadership group (officers)
2. meetings (meetings are required by ANS Bylaws)
3. communication with constituencies (local section members or ANS national members in its geographic area)

**Dormant**

A dormant section has failed to revitalize after every effort has been exhausted.

Dormant sections are issued a final Notice of Pending Dissolution, and are moved to be dissolved.

## 2.0 SERVICES PROVIDED BY ANS

This section provides a summary of the services provided by ANS national to its constituent units. Sections should contact the ANS Staff Liaison, Tracy Coyle, [tcoble@ans.org](mailto:tcoble@ans.org) for assistance when working with ANS national.

### 2.1 General Listing of Services

#### **Governance Services – [governance@ans.org](mailto:governance@ans.org)**

- Maintains ANS Leadership Directory.
- Provides minutes of governance meetings upon request.
- Coordinates amendments to Society Bylaws and Rules, Student Section bylaws and Local Section bylaws.
- Assists in coordination of ANS officer visits.
- Provides assistance in development of new local sections.
- Maintains historical files for local sections reference, including each section's charter and bylaws and rules.
- Maintains the Local Section Manual and accompanying updates.
- Coordinates the national Honors and Awards and Scholarship Programs.
- Provides mailing list of ANS members in each section.

#### **Membership and Marketing – [members@ans.org](mailto:members@ans.org)**

- Provides ANS national member application forms and other recruiting tools
- Assists sections with marketing and ensures all sections follow the [ANS Branding Guidelines](#)

#### **Outreach – [outreach@ans.org](mailto:outreach@ans.org)**

- Provides assistance with planning outreach events, complementary ANS materials, and grants to sections.

#### **Meetings and Exhibits – [meetings@ans.org](mailto:meetings@ans.org)**

- Provides support and guidance for Topical Meeting planning, site selection, contract negotiations, and budgeting.

#### **Information Technology – [admin@ans.org](mailto:admin@ans.org)**

- Maintains an archive server to store section documents.
- Provides technical support for section webmasters.

### 2.2 Leadership Directory

ANS publishes an annual Leadership Directory that provides contact information for volunteers associated with the Board of Directors, committees and special committees, divisions, local sections and student sections. The Leadership Directory is emailed every July to local section chairs and is accessible online only to those listed in the directory.

Because this directory provides contact information for the local Section chairs, it is important that all local sections notify the ANS staff liaison of the current status of this information. Updates on local sections officers should be provided annually, after each election, and of course as part of the annual report.

Office updates can be completed by submitting the [online annual report](#) or by notifying ANS at [governance@ans.org](mailto:governance@ans.org)

## 2.3 Liaisons to the Local Section

ANS assigns two principal liaisons to follow the activities of Local Sections and to interface with the ANS on matters involving individual or all Local Sections as described below. It is a good practice for local sections to know these individuals and provide them with copies of relevant correspondence.

### [ANS Staff Liaison](#)

The Society assigns a staff liaison to be the principal point of contact at ANS headquarters for local section matters.

### [Local Sections Committee Liaison](#)

Each member of the Local Sections Committee (LSC) is assigned as liaison to specific regions. The liaison assignments are listed on the Local Section Committees web site and are distributed to the LSC members and local section chairs by the LSC chair. The LSC liaison periodically contacts his/her assigned sections to offer assistance and guidance and act as a resource for information about Society policies and activities. They also collect section information twice a year before the national ANS meetings to update the LSC on the status of each section and to share “successful practices” noted by various sections. Refer to section 3 for a more complete description of the LSC and its support role for local sections.

## 2.4 Society Insurance Coverage for Sections

The liability coverage for American Nuclear Society **applies to activities of all Unincorporated Local and Student Sections** while performing duties related to the conduct of the business of American Nuclear Society.

The coverage will only defend “American Nuclear Society” with respect to liability arising from **Incorporated** Sections’ actual or alleged negligence. **Any Incorporated Section should secure their own insurance.**

Based on the above, the “Society Insurance Coverage for Sections” should outline that **Incorporated Sections are not considered an “insured” under American Nuclear Society’s Insurance and should secure their own insurance.**

## 2.5 Local Section Items in ANS News

ANS News is a bi-monthly publication distributed to ANS national members. It provides a forum for local sections to share their news with the Society membership. Local sections are encouraged to submit at least one article per year highlighting section activities. Submissions should be sent to the editor of ANS News at [ansnews@ans.org](mailto:ansnews@ans.org).

## 2.6 ANS Communications and Outreach

The [Center for Nuclear Science and Technology Information](#) is an initiative of the American Nuclear Society (ANS) working to increase understanding of and support for nuclear science and technology. ANS members play an important role in changing the conversation about nuclear.

To assist members with their outreach efforts, ANS offers in-kind public outreach materials to a limited number of ANS student and local sections that host outreach events aligned with ANS public information goals. Requests that meet the selection criteria are fulfilled on a first come, first served basis. The available items are listed on the [Outreach Materials Request Form](#).

ANS also offers [Public Information Assistance Grants](#) to sections exclusively for new [Nuclear Science Week](#) initiatives. Two grants are available, one for \$1,000 and one for \$500. Deadline for application is July 31.

The [Presentation Library](#) (member login-required) was developed by the ANS Communications Committee. This resource library is available to members who wish to use and share materials.

The ANS NEED Committee also offers sections grants for member recruitment and outreach to underserved communities. Visit the [NEED Committee website](#) to learn more about the NEED Grants for Academic Programs (NGAP) and the George A. Ferguson Motivational Grant (GAFMG).

## 2.7 ANS National Honors & Awards and Scholarship Programs

The ANS national and its divisions sponsor a substantial number of honors and awards on an annual basis. Local sections are encouraged to submit nominations for the both the national and division-administered awards.

Information and nomination forms for each award can be found on the [ANS website](#).

One of the national awards of particular importance to local sections is the [Local Sections Meritorious Award](#). This award is given to large, small and international sections each year and carries a monetary award of up to \$1,200 for the winning local section(s). Striving to excel in each of the selection criteria areas will benefit the section beyond the competition for the award itself. All sections who submit an annual report by August 1 are automatically considered for this award.

ANS also plays an important role in helping students complete their education and prepare for careers in nuclear science and technology (NS&T). More than 20 scholarships, most named after pioneers and leaders in NS&T, are awarded each year to students with outstanding academic credentials. Special scholarships are available to students who have significant economic needs in order to pursue degrees in NS&T. Local Sections are encouraged to promote the ANS Scholarship Program to high school seniors and college students through their outreach and meetings.

Information and applications for each scholarship can be found on the [ANS website](#).

Local Sections can help support the ANS Scholarship Program by encouraging members to make contributions to the scholarship funds by completing the [scholarship donation form](#).



## 3.0 THE ANS LOCAL SECTIONS COMMITTEE

The Local Sections Committee (LSC) is a standing committee of the Society whose purpose is to consider matters of importance to local sections and to assist in the formation of new sections. The LSC meets at least twice a year, including during each of the two ANS national meetings, and hosts periodic snap shot calls via teleconference.

The LSC primarily acts as the forum for exchange of information between sections and the Society and among sections. It helps and encourages local sections in carrying out their own programs. The Committee has the responsibility from the Society's Board of Directors to ensure proper conduct of the sections and compliance with ANS Bylaws and Rules.

This Committee is composed of not fewer than six nor more than twelve total members of ANS (Fellows, Members, Students, Emeritus or Honorary Life), appointed by the ANS President, each serving a three-year term, plus the Chair of each local section as ex-officio, voting members. At least one of the appointed members shall be a student member, and at least one shall be a non-U.S. resident. The Chair of each section, or designated alternate should attend Local Sections Committee meetings as an official section representative. It is this representative's responsibility to report back to his/her section, information from LSC communications.

This committee cooperates with individuals and groups in the formation of new local sections and plant branches, revitalization of dormant sections, and sustaining established sections.

The Chair of the LSC appoints committee members to be liaisons to the sections. Each LSC member will have two or more sections and/or plant branches which they are expected to contact, assist, make recommendations to as appropriate, and be the liaison between them and the LSC. They should bring to the attention of the LSC Chair any problems or suggestions regarding section leadership and activities.

### 3.1 Keeping Informed

**The Local Sections Committee website - <http://committees.ans.org/lsc/>**

This website provides section management resources, best practices, how-to-guides, and news from local sections. The site is updated regularly so be sure to bookmark it and check back periodically.

**ANS Collaborate - <https://collaborate.ans.org/home>**

A virtual networking site exclusively for ANS members. Use this site to post discussion threads and join Mentor Match either as a mentor or mentee. Members can set their email preferences to real-time, daily digest, or no email.

There are two groups set up for local sections:

- Local Sections Committee group - This is a closed group for LSC appointed members and section chairs who serve as ex-officio members for LSC business and communications. Chairs are assigned to this group as they update their officer information with ANS HQ.
  - Group Email: [ans-LSC@connectedcommunity.org](mailto:ans-LSC@connectedcommunity.org)

- ANS Section Management – This is an open group where any member who is interested in section operations can start discussion threads and ask other sections for help.
  - **Group Email** - [ANS-anssectionmanagement@ConnectedCommunity.org](mailto:ANS-anssectionmanagement@ConnectedCommunity.org)

**LSC Listserv** - [comm-ls@list.ans.org](mailto:comm-ls@list.ans.org)

The Local Sections Committee electronic mailing list. This service is still manually updated regularly by ANS HQ to include LSC members and section chairs. ANS Collaborate was intended to replace the listservs, however since many chairs do not maintain their membership, the listserv is still used to keep them informed. To avoid filling up inboxes with discussions, it is recommended to keep discussions to ANS Collaborate and use the listserv for important messages only.

## 4.0 SECTION OPERATIONAL GUIDELINES AND BEST PRACTICES

This section provides information that may be helpful to section leaders in operating the section or planning activities, and as the section title implies, the guidance provided is not mandatory.

### 4.1 National and local dues structure

ANS National dues shall be set by the Society. Currently dues are \$170 for professionals, \$125 for young members and Emeritus, and \$35 for students.

Local dues are set by each section and range from \$0-\$20.

ANS membership runs on a calendar year from Jan. 1 through Dec. 31. Dues received after Sept. 1 are applied to the following year's membership. If dues are not processed by Dec. 31, membership is forfeited until dues are paid. It is recommended that local sections follow the same calendar cycle and mail out renewals in the Fall.

Sections can opt to have ANS HQ collect their dues for them or set up a PayPal account to collect local dues on their website. ANS will collect dues for the calendar year, and send the section a check or direct deposit at the end of the year. Sections who collect their own dues receive their funds in real-time.

### 4.2 Program Planning

Programs can include Society officers and committee chairs as speakers as well as industry, university and government professionals. Joint meetings with other professional societies can provide very interesting topics and opportunities to meet other professionals. The program committee should consider job interests, backgrounds, current professional activities, and opinions to determine topics and types of speakers. Section meetings should be arranged early in the year, must allow flexibility in scheduling to assure the availability of desired speakers in the year's program.

Arrangements can be made for the ANS President, other officers, to visit local sections by contacting the ANS Staff Liaison as soon as possible after the Society's Annual (June) Meeting. Most speakers' schedules must be arranged for efficiency in time and travel costs. Section requests for Officers will be filled on a first-come-first-served basis and are based on the current section status.

Programs other than traditional after dinner speaker may be beneficial. [APPENDIX F: LOCAL SECTION PROGRAMS](#) provides a list of successful local section program-related activities.

The LSC website also has lists basic program and out of the box ideas in the Best Practices section - <http://committees.ans.org/lsc/best-practices/>

### 4.3 Setting Section Goals

Your leadership team can determine what accomplishments you would like to achieve this year by setting section and position goals. During the year, you can monitor your progress and reward leaders for their success. Share these goals with your LSC Liaison so they can assist in keeping you on track.

All goals must be measurable. For example, do not write a goal that states, "Increase membership this year." A well-written goal will explain *how much* of an increase your section is working toward. It should read, "Increase membership by 20 percent." That way, it will be easy for you to measure your success.

When listing your section goals, you should determine which category the goal falls into: membership & communication, organization & leadership, fundraising, public education, section activities, or advocacy. Set a definite deadline for each goal and assign someone in your section to be responsible for overseeing the accomplishment of this goal.

[Appendix I](#) provides guidance effective goals setting and developing SMART goals.

#### **4.4 Financial Operation of Sections**

These paragraphs describe policies and good practices regarding financial operation that are of importance to the section Chair and Executive Committee in establishing controls and overseeing the operation of the section. Detailed guidance for the financial operation of Local Sections which is of particular importance to the section Treasurer, such as information on tax laws, tax forms, and associated instructions is provided in the [Local Sections Treasurer's Manual](#).

##### Financial Autonomy

Local sections must be financially autonomous. Specifically, the section must raise, maintain, and spend its funds in a professional manner that serves its members' interests and in keeping with the objectives of the Society.

##### Budgetary Planning

A budget should be prepared annually and approved by the Executive Committee. The responsibility for preparing the annual budget may vary from section to section. The budget should allow projected expenses associated with each key activity or committee, should show projected sources of income, and should show a projected net profit or loss that is consistent with the section's Strategic Operating Plan ([see Section 4.5](#)). Typically, the budget is based on historical patterns of income and expenses, adjusted to address special considerations for the year. Once established, the budget should be adhered to unless formally revised by the Executive Committee. To help facilitate turnover of key section documents when the section leadership changes, sections should keep the current and perhaps one or more previous budgets available for reference.

##### Use of Policies and Procedures

The section's financial policies and procedures should be established (typically proposed by the Financial Committee and approved by the Executive Committee) to address issues such as the following:

- Dual signatures (if possible) required for all checks
- Authorization required for various sizes and types of expenditures
- "Petty Cash" items in/not in the approved budget
- Moderate cost items in/not in the approved budget
- High-cost items in/not in the approved budget

Permanent records of the terms and approval of these procedures or rules are most conveniently kept as a “living” document such as the Section Rules rather than as an attachment to the Executive Committee minutes when they are approved. To help facilitate turnover of key section documents when the section leadership changes, sections should keep the current Section Rules available for reference.

### Accounting Records

Section financial records must be accurate, complete, legible, and simple. One effective means of keeping accounting records is to use a bound accounting ledger that captures each transaction (dues income, meeting receipts, cash and check disbursements, interest income, etc.) to avoid the possibility of missing pages, and to keep back-up records for each of the transactions (invoices, receipts, requests for donation, Executive Committee minutes excerpts authorizing payment, bank statements, etc.) chronologically in a binder.

Financial and accounting records should be retained as permanent files of the Section. Refer to [Section 4.9 \(Records Management\)](#) for guidance.

### Investments

It is prudent to write into Section Rules which investments the section can make and also who has signature authority.

### Use of Legal Counsel

If legal advice is needed, sections are encouraged to use legal counsel from their local area so as to properly consider community attitudes as well as state and local laws.

### Income

Income sources may include section dues, registration fees and surcharges on meals at section meetings, profits from sale of meeting proceedings, approved donations, local non-compulsory contributions, and a portion of profits from national or topical meetings that the section helps sponsor. Society Rule 17.5.6 defines the conditions under which Local Sections may solicit funds. Refer to the [Topical Meeting Manual](#) for additional information on the income potential to local sections from hosting a National or Topical meeting.

IRS regulations require that dues be set so that no benefits ensue to the members of a section. Dues should not be less than the fair market value of member benefits.

Unless a source of support is available to cover part or all of the cost of section meetings, it is prudent for the section to plan to break even on each or a series of meetings. Many sections are able to attract well-known, out-of-town speakers without paying speaker honoraria or travel expenses by simply communicating their policy to that effect when contacting potential speakers.

### Annual Financial Report

A financial report must be completed and submitted yearly to the ANS Staff Liaison. A [template](#) has been created by the LSC as part of the Annual Report.

### Federal Taxes

The ANS National Federal Tax exemption does not extend to the sections. Sections must file IRS Form 1023 to obtain an exemption and they must maintain it. Annual IRS filing (Forms 990 and 990T) may be required (if annual income exceeds \$25,000). Refer to the [Local Section Treasurer's Manual](#) for detailed guidance and relevant tax publications.

#### State Laws - How They Affect Sections

State laws governing nonprofit corporations vary from state to state. The section must verify state filing requirements - generally with the State Taxing Authority and Attorney General's Office. Some have special statutes while others do not. They may govern: minutes of your meetings, expulsion of members, number of directors, etc.

#### Financial Accountability

In order to ensure financial accountability, a section may wish to implement one or more of the following controls:

- Limit the Treasurer's term in office,
- Require dual control over release of funds,
- Require an independent annual review of the Section's financial records,
- Obtain a bond as insurance, and/or
- Authorize a maximum amount which can be spent without prior Executive Committee approval.

### **4.5 Section Planning Document (Strategic & Operational Plan)**

Each local section should have its own periodically updated strategic and operational plan. Planning documents keep the section focused on issues and longer-term programs as the section leadership changes from year to year. The following format is recommended by the national ANS Planning Committee:

- Local Section Goals and Objectives
- Trend Analysis
- Resource Requirements
- Strategic Planning Actions (next five years)
- Tactical Planning Actions (next twelve months)

The document need only be one-to-two pages, and should be reviewed, updated, and approved annually by the section's executive committee.

### **4.6 Incorporation**

Each Section must decide for itself whether or not to incorporate; larger sections, especially those with substantial activity, should very strongly consider and investigate this option.

A membership organization, in general, may operate as either a corporation or as an unincorporated association.

Three advantages of incorporation are:

- Continuity of existence
- Limited liability
- Greater certainty regarding applicable rules of law

Principal disadvantage:

- Greater degree of administrative formality is required, including initial filings with governmental agencies and public disclosure of information regarding section activities (annual reports) to state of incorporation.

#### How to File

Forms usually are obtainable from the appropriate state agency and a minimal filing fee is charged. You should obtain necessary professional legal and accounting assistance. Such resources may be available from members of your section, or seek such assistance from employers of section members.

Processing time varies from state to state but generally will not exceed two months to complete and will cost generally about \$300 to \$800, depending on legal fees.

If considering incorporating, care must be taken to ensure that Bylaws, Rules and articles of incorporation provisions:

- Are compatible with your state's requirements for issuance of a non-profit corporation charter,
- Will not encroach on impermissible areas of activities which disqualify your state's non-profit charter from an IRS 501(c)3 tax exemption, and
- Recite verbatim certain key provisions of the appropriate sections of the Internal Revenue Code.

## 4.7 Insurance for Sections

Insurance is most needed for the following typical Section activities:

- Local section general meetings
- Local section sponsored Topical meetings
- Meetings being held with another association or society
- Public information activities
- Authorized speakers and publications

### 4.7.1 *Incorporated Sections*

The insurance coverage for American Nuclear Society does not extend to incorporated sections of ANS as they are separate legal entities without common controlling interest. The insurance contracts for ANS cannot add the section as an “insured” to extend coverage to incorporated local sections. This is true with ANY insurance contract.

American Nuclear Society is covered with respect to their liability arising from the actions of an incorporated local section. The incorporated local section is “on its own”

ANS may very well have to pay the majority of damages as a result of your actions even if the extent of their liability is tiny. This is due to comparative negligence standards used by most states. Most court settlements look to “make whole” the injured party and can arbitrarily determine that the negligent party with the most assets will pay the majority of the claim regardless of their degree of fault.

If the insurer for ANS pays out on a claim, the incorporated section may very well face legal action, (subrogation), from the insurer for ANS in an attempt to recover some of the damages.

ANS cannot prevent their insurer from subrogating against an incorporated section for damages as this is a fundamental part of the “conditions” portion of any insurance contract.

Typical coverage for an incorporated section would include general liability, auto liability, directors and officer’s liability, and worker’s compensation if the section has employees.

If you fail to maintain worker’s compensation coverage and an employee is injured, you are in violation of the law. Board members would automatically be held accountable for expenses and damages as a result of occupational injury. Bankruptcy, either corporate or personal, would not shield individual board members from payment of damages to the injured employee.

The directors and officers of the incorporated sections are not covered by the directors and officers insurance for ANS. This coverage protects the board members with respect to liability arising from their actions as a volunteer board member. The coverage protects the board members personally. Failure to maintain coverage may result in the individual board members incurring large legal and settlement costs.

Indemnification of the board by the entity does not fully protect volunteer board members. If legal action is brought against a board, it may fall on the *personal* liability of the board members depending upon the financial status of the entity and the degree of



negligence involved.

Board members *may* have some coverage under their personal liability policies, (Part of a homeowner's insurance contract). Generally this coverage is limited. Board members should review their personal coverage to see what, if any, coverage would apply for their liability arising from being a volunteer board member.

Liability arising from board member actions is only fully addressed by the purchase of a directors and officers policy. The policy should include the board members, employees, trustees, volunteers and the entity itself as Named Insured.

If the section sells liquor as part of their fund raising efforts, then Liquor Liability coverage may be required depending upon State dram shop laws. This coverage is NOT automatically provided by a general liability policy.

#### **4.7.2 *Unincorporated Sections***

Unincorporated local sections are essentially a subsidiary of American Nuclear Society. Care must be taken to avoid unnecessary or unusual liability exposures falling on ANS.

Failure to inform American Nuclear Society of any events held by an unincorporated section may jeopardize the insurance coverage for American Nuclear Society. The unincorporated sections must inform American Nuclear of any events considered by the sections prior to the event taking place.

Members of an unincorporated local section cannot enter into a contract on behalf of American Nuclear Society. All contracts must be executed by an authorized individual at American Nuclear Society.

Any volunteer activity on behalf of an unincorporated section must be reviewed by American Nuclear Society prior to the activity occurring in order to avoid jeopardizing the insurance coverage for ANS.

### **4.8 Member Communications**

An important component in member engagement is regular and reliable communication. Use bulletin boards, social media, newsletters, in-person meetings, email and your section website to share local and national ANS news and initiatives. Regular communication with members keeps ANS at the forefront and helps members understand that they are part of a vital, dynamic organization.

#### **4.8.1 *Copyright Issues***

When using images for social media, websites, and other section communications you should always make sure they are not copyright to avoid any copyright infringements. The easiest way to avoid this is to use your own photos taken at meetings and events or reach out to a local lab or company/organization and ask if they have any images that can be used. Usually, companies are happy to share photos if you give credit notation. When in doubt always ask permission and get it in writing!

The LSC has put together a list of royalty-free image sources for sections to use in their communications - <http://committees.ans.org/ls/wp-content/uploads/2019/04/Royalty-Free.pdf>

#### 4.8.2 *Permanent Mailing Address*

A section should consider a permanent mailing and/or email address. A permanent mailing address is especially useful in making sure that communication from ANS headquarters reaches the section during the transition period of new officers and committee members. Some sections use the address of the current section Chair. If, however, that person happens to move, it can leave the section without a point of contact. Other sections have a P.O. Box. A permanent mailing address may also be required for incorporation of a section.

#### 4.8.3 *Section Mailings*

Regular mailing costs can be a major expense. Reductions can be accomplished by using email or by providing organizations with many section members multiple copies of section correspondence, to be distributed by interoffice mail. Plant branches offer a unique advantage due to the entire membership being in one corporate organization. When regular mail is necessary, lower-cost alternatives to first class mail can be provided by the postal service for large mailing lists or when prompt delivery of dated material is not needed. A section that is incorporated as a non-profit organization is eligible for lower bulk mailing rates.

#### 4.8.4 *Mailing Lists*

Sections should keep record of their members contact information and establish contact mailing lists for communication purposes. Communications can be easily distributed electronically through [Constant Contact](#), [Mail Chimp](#), or other online marketing services. These services also remove duplicate and bad email addresses from your list, provide a link to opt-in to communications as well as the required opt-out on all communications. Organizations that do not provide an opt-out option may be reported as spam and can have their messages blocked.

Sections are provided an updated membership list (from their geographic location) from ANS HQ upon receipt of an annual report. Sections should use this list to update their mailing lists and recruit ANS members to join their section.

Sections are also encouraged to send an annual ANS national membership solicitation to section participants that are not ANS members, or provide their mailing list to ANS HQ to send the solicitation.

#### 4.8.5 *Section Newsletter*

Newsletters should provide more in-depth information on a variety of topics of local and national interest. Sections are encouraged to produce a newsletter at least twice a year. Appoint a newsletter editor to delegate writing assignments, develop a production schedule, proofread and edit the articles and lay out the stories. Your section can distribute its newsletter to members electronically or as hard copies. A good newsletter contains most or all of the following information on a regular basis to motivate, inform, and recognize the Section members:

- Upcoming section activities
- A review of past activities
- Introduction of new members (and recognition of sponsors)
- Local Industry news
- References to *Nuclear News* or *ANS News* articles
- Description of the benefits of being a part of the section
- Promotion to recruit new members
- Recognition of member contributions to the section (Committee Chairs, Speakers, etc.)
- News about members (non-Section news, e.g., awards, promotions, unusual hobbies, retirements, etc.)
- Highlights of the Executive Committee meetings

Normally, the activities of section committees will generate most of the information you want to communicate to your members. An alert editor has to watch all sources, i.e., Executive Committee meetings minutes, publications of companies in which their members are employed, etc. Sometimes a “What is New With You?” box in the newsletter can stimulate newsletter input from members. Student sections from within the section area are a resource as well.

Printed newsletters can easily be produced in a variety of type styles with graphics and text boxes for photos, and can be reproduced inexpensively. Sometimes Chairs can get a member’s company to duplicate the section’s newsletter in their facility. If possible, shift the burden from one company to another periodically. Also, most sections now use eNewsletters distributed electronically through [Constant Contact](#), [Mail Chimp](#), or other online marketing services.

#### 4.8.6 Section Websites

A website demonstrates that a section is progressive and concerned with meeting the needs of its members. It can also be a section’s best source of information. The first step is finding someone to serve as your website administrator. Petition your section to see if there is someone with web experience (especially WordPress).

ANS provides sections with a WordPress template that is designed according to the graphic standards - <http://localdev1.ans.org>. If your section needs a site, or has one that is not in accordance with the graphic standards, please contact [governance@ans.org](mailto:governance@ans.org) to start a site using the template.

## 4.9 Records Management

Sections create and accumulate a variety of documents. A record keeping system should be established to control the paperwork and ensure a historical tracking of the Section. The task usually is part of the Secretary’s duties. ANS national offers a [File Archive Server](#) for all constituent units, if needed. Contact your [ANS Staff Liaison](#) to set up access to the server.

Guidelines or procedures should be set up for what to keep, how long to keep it, and where to keep it. Suggested records to keep include:

- Planning documents
- Bylaws and Rules (and all amendments to the original)

- Incorporation papers, tax papers, charters, and any legal documents
- Listings of officers and committee members
- Treasurer reports
- Executive Committee and Annual Business Meeting minutes
- Manuals and directories used by the Section
- Ballots of elections
- Annual reports to the ANS Executive Director
- Section Liaison Reports
- Meritorious Section Award Applications and Citations

How long records should be kept depends on the historical value and laws that govern information. ANS headquarters suggests you keep all tax, incorporation, bylaws, and legal documents indefinitely.

The following are practices to consider in establishing a workable records system for the section:

- Purge unnecessary and duplicate records annually
- Use the Meritorious Award Application as the main component of the annual report
- Have a designated member be the record repository or move the records to a predetermined officer
- Microfiche or scan historical records if too voluminous
- Assemble important documents for a year into a bound “yearbook”

[Appendix H: SECTION RECORD RETENTION GUIDELINES](#) provides a suggested timeframe for maintain documents.

#### **4.10 Public Relations**

Each section will have to research and develop its own media list to promote your section in the community and surrounding areas. If your town is small, the local newspaper will publish news and post events on their calendar page. Many newspapers are online and provide the ability to post stories (i.e Patch.com). You can also contact your area’s suburban and downtown weekly newspapers published in larger cities. Local industrial and business periodicals may also provide some publicity. Other professional societies will often carry ANS news of interest to their members.

Social media is a quick and inexpensive way to tell the community what your local section is doing. Friends and followers can learn more about your local section and become aware that it is part of their community.

Company publications are also a possible means of providing visibility for the section. This is particularly true of plant branches where virtually all of the members are affiliated with one employer. They will run news of your members who receive awards, are elected to office in your organization, or are running a seminar or conference. Another resource is members’ university or college alumni newsletters.

#### **4.11 Promoting Local Section and ANS National Membership**

As with any organization, attracting and retaining members is most successful when

members perceive a benefit with their investment of time and money. It is therefore important for the section to be able to offer a spectrum of activities that will appeal to a large cross-section of prospective and existing members, and to provide recognition and professional growth opportunities for those having the inclination to contribute.

The section should develop a way to remind their members of their dues responsibility, hence membership status, at the beginning of each year. Sometimes individuals do not renew simply because they do not realize they are supposed to.

The guidelines provided in the [Local Sections Membership Manual](#) have been compiled from successful local section membership promotional practices.

## 4.12 Elections

Although not required, it is recommended that ANS sections align their elections with the ANS national year elections, where the Chair and other officers are appointed from June 15 to June 14 the following year.

Election timeline:	
March 15 - 30	<ul style="list-style-type: none"><li>• Identify Nominating Committee per your section's Bylaws</li><li>• Identify candidates, obtain their concurrence, verify officer is an ANS national member, obtain bios.</li></ul>
April 1- 20	<ul style="list-style-type: none"><li>• Organize electronic ballot, and provide paper ballot. Google Docs and <a href="#">BallotBin</a> are free services to help with this.</li><li>• Issue email to all Section members in good standing (dues paid)</li><li>• Allow two weeks to vote by electronic or paper ballot</li><li>• Vote ends by 5pm (your time zone) on April 20</li><li>• Nominating team reviews the electronic and paper work</li></ul>
May 1 - 10	<ul style="list-style-type: none"><li>• Independent team reviews the votes per your section's Bylaws</li><li>• Responds back to Nominating Committee Chair as "verified"</li></ul>
May 12	<ul style="list-style-type: none"><li>• Nominating Committee chair notifies your Chair of results.</li></ul>
May 15	<ul style="list-style-type: none"><li>• Chair announces the names the new officers and vice chair</li><li>• Treasurer prepares any changes to banking information</li><li>• Secretary notifies ANS HQ of the new officers and effective dates. <a href="mailto:governance@ans.org">governance@ans.org</a></li></ul>
June 15	<ul style="list-style-type: none"><li>• New officers take their positions for June 15 to June 14 of the following year.</li><li>• Local Section website is updated.</li></ul>

#### 4.13.1 SAMPLE ELECTION COMMUNICATIONS

Dear Section Members:

As per our bylaws, we have to hold an election for [NAME OF SECTION] [NAME OF POSITION] at this time. Our current [NAME OF POSITION], [NAME OF MEMBER ], has agreed to stand for re-election for a 3 year period, and no other candidate has been nominated.

Vote for:

1. [NAME OF MEMBER]
2. Write in Candidate: \_\_\_\_\_

Please submit your vote to [insert email] by [date] so we can have a quorum for the vote (2/3 majority). We will announce the results at the next section meeting.

Thank you very much

[SECTION SECRETARY]

Save as ...

Print

Clear

P. O. Box 5367  
Albuquerque, NM 87185-5367  
<http://local.ans.org/trinity/>  
[ans.trinity@yahoo.com](mailto:ans.trinity@yahoo.com)

American Nuclear Society  
Trinity Section



### ANS Trinity Section 2018 Election Ballot

Return by April 6, 2018

If voting by postal mail, please do not put your name on the ballot itself, but include your name in the envelope and mail the paper ballot to ANS Trinity Section at the address above. You can also vote by email—to do so, please email your vote to [anstrinity-eballot@yahoo.com](mailto:anstrinity-eballot@yahoo.com). If you vote by email, we need to have some way of identifying you, because only Section members are eligible to vote, so please include your name in the email. If your membership has expired, please go to <http://local.ans.org/trinity/join.html> and renew your membership—complete the membership form (and pay dues, if applicable)—or return the enclosed membership form (with dues, if applicable) along with your ballot. Students and emeritus members are not required to pay dues.

#### Non-elected Positions (automatic rotation)

##### *Chair, 1-year position:*

Travis J. Trahan, Los Alamos National Laboratory

##### *Immediate Past Chair, 1-year position:*

Nancy Jo Nicholas, Los Alamos National Laboratory

##### *Previous Chair, 1-year position:*

Evelyn M. Mullen, Los Alamos National Laboratory

#### Elected Positions (short bio information attached for first-time candidates)

##### *Vice-Chair (then becomes Chair, etc.), 1-year position (vote for 1):*

Matt Denman, Sandia National Laboratories

Write-in:



##### *Secretary, 3-year position (vote for 1):*

Suzanne Dennis, Nuclear Regulatory Commission

Write-in:



##### *Treasurer, 3-year position (vote for 1):*

Pat McDaniel, University of New Mexico

Write-in:



##### *At-large Member, 3-year position (vote for TWO):*

Adam Hecht, University of New Mexico

Matt Dennis, Sandia National Laboratories

Write-in:

Write-in:


If the above candidates are elected to the nominated positions, there will be two At-large Member unexpired terms ('19 and '20) to be filled by Executive Committee appointment. Volunteers are solicited for those positions.



## 5.0 APPENDICES

[Appendix A: ANS NATIONAL BYLAWS AND RULES](#)

[Appendix B: LOCAL SECTION REGIONS](#)

[Appendix C: SAMPLE BYLAWS & RULES FOR SECTIONS](#)

[Appendix D: RESPONSIBILITIES OF SECTION OFFICERS, EXECUTIVE COMMITTEE AND COMMITTEE CHAIRS](#)

[Appendix E: HOW TO FORM A LOCAL SECTION PLANT BRANCH](#)

[Appendix F: LOCAL SECTION PROGRAMS](#)

[Appendix G: OBTAINING SPONSORSHIP OF A TOPICAL MEETING GUIDELINES](#)

[Appendix H: SECTION RECORD RETENTION GUIDELINES](#)

[Appendix I: EFFECTIVE GOAL SETTING](#)

[Appendix J: Volunteer Recruitment](#)