

IMS Chapter Development Funding Program Guidelines

Purpose: To promote and improve the value of your chapter to your current (and future) members.

Rules:

- Funds must be used for the purpose of *membership development*, such as attracting new members, working with local student branches, or improving the value and quality of membership of our current members.
- Events must be reasonably well-publicized such that local IEEE and/or I&M members will be aware of the event. Funds may not be used for private events.
- Within one month of the completion of your event, a report on the event, including the proposed results or metrics, must be submitted.

Application Package

1. Proposal detailing the purpose for the funding request using the on-line application form that can be found on the I&M Society web site (<http://ieee-ims.org/membership/chapter-activities>).
2. Detailed budget indicating total amount requested and how funds will be allocated. *If changes to the initial budget included in the application package occur, an updated and final budget must also be submitted.*
3. Expected results and why - For example, increase in membership, better membership experience for existing members, student motivation, etc., and why those results pertain to your proposed event.
4. Metrics – How will you measure the success of your event? For example, number of attendees who have never attended an I&M event in the past, number of new members who joined at your event, number of student attendees, a survey completed by the attendees, etc.
5. Preferred method to receive funds. (See “Funding Mechanisms” below for more details.)
 - Reimbursement
 - Advanced funding via the local IEEE Section
 - Advanced funding via another method

Application Process

- Submit your proposal electronically to Octavian Postolache, I&M Chapter Chair Liaison, at octavian.postolache@gmail.com.
- All applications submitted by Chapters that do not include or that don't follow the submission of a correct and complete Chapter Report Form will be discarded.
- Requests can be submitted at any time throughout the year.
- The event has to take place within **6 months** of receiving the IMS funds.
- The I&M Membership Development Committee will review your proposal. A response from the Chapter Chair Liaison will be provided within **1 month** of receiving the proposal.
- The Membership Development Committee reserves the right to propose changes to your proposal.
- Some types of advance fund transfers (see Funding Mechanisms, below) require at least three weeks to complete. If your event will require an advance fund transfer, please include this time period into your planning.

Maximum Amount of IMS Funding for an Event

The maximum amount of funding provided by IMS to a chapter for a single event is **\$8,000 USD**.

Please note that the total amount the chapter might want to spend on an event may be more than \$8,000, and the chapter can certainly use other funds it has to supplement the amount received from the IMS Chapter Development Funding program for a given event. Thus, the total amount of expenses for an event is up to the chapter.

If the initial IMS grant amount requested by the chapter is less than the maximum amount, a second request to increase the amount at a later date, can be made. In this case, the total IMS request (the original and the second request) cannot exceed the maximum amount of \$8,000, and the amount of the increase must be justified in detail by the applicant.

The second request must be made no later than **two months** after the submission of the original request. Please keep in mind that inappropriate funding requests will not be considered.

Seed Money for Revenue-Generating Events

The I&M Society can provide additional “seed” money beyond the limit given above for events that have the potential to generate revenue. Seed money is defined as money that is planned for expenditures to support an activity that will generate revenue, such that some of this revenue can be applied towards a future purpose, such as a second event.

In those cases, the applicant has to declare the provisional revenue amount in the proposal, together with a plan to use this money for a future Chapter event in agreement with this guideline and the IMS mission. The second event has to be held **within 9 months** from the supported one.

Funding Mechanisms

There are several options for funding. Please indicate your preferred funding option in your proposal package.

Preferred method:

1. Reimbursement: The applicant keeps receipts of his/her expenses. He/she submits them after he/she incurs the expense, or after the event is concluded. The I&M Society promptly reimburses the applicant for the expenses he/she incurs.

If the applicant is financially limited relative to the expected expenses, the I&M Society can also arrange one of the following advance funding mechanisms:

2. Transfer funds to the local IEEE Section to be dispersed to the applicant. To use this option, the applicant should feel comfortable with his/her relationship with the local IEEE Section, such that the applicant trusts their accounting for him/her and their responsibility in prompt disbursement of the funds. Please supply the bank information for the local IEEE Section's bank (obtained from the Section treasurer). This information must include the Bank account number, SWIFT, Owner of the Account, and any other relevant identification information. The applicant's first submission does not need to include this information, but he/she will need to

provide the information in adequate time to arrange the transfer of funds.

3. Transfer to a Chapter-dedicated bank account. The applicant should allow plenty of time prior to when he/she needs to expend the funds (at least a month, preferably more) to ensure that the transfer has been properly arranged. Please include the relevant bank information required for the transfer.

If advance funding via a method other than through the local IEEE Section is checked, the applicant should plan to supply the appropriate information so that the transaction can be reviewed and arranged, if approved. Please research the cost of the requested financial transfer.

If the applicant is asking for an IEEE check, he/she should determine how easily he/she can convert it to cash, and how long it will take.

If advance funding is required, please indicate the date you wish the advance funds to be in place. (An approximate date can be used for the application package.)

If you request a financial transfer in advance of your expense, you must submit a report of the actual expenses no later than one month after the event has concluded.

If any of that advance funding was not spent, then at this point in time, either the money should be returned, or a new proposal should be generated for how the money will be spent in the future.

The I&M Society reserves the right to decline fund transfers that are considered inappropriate, such as transfers to personal accounts.

Records should be kept for all expenses. Receipts must be submitted for each expense greater than \$25. (This is required for the IEEE to keep the “non-profit” status with the U.S. government.)

Funding Proposal Ideas

Proposals may concern but are not limited to the following events:

- Make a handout pamphlet to show who you are and what you do. (An I&M Chapter did this successfully - it was an impressive and personal way to interact with potential new members.)
- Provide travel expenses for a guest speaker. (Note: there is also an “I&M Society Distinguished Lecturer Program,” which is separate from this process.)
- Provide partial support for local lodging and food expenses of a Distinguished Lecturer (Note: the “I&M Society Distinguished Lecturer Program,” already covers the travel expenses of the DLs.)
- Organize audits, visits, internships of Chapter members within local industries (Note: all the documentation necessary to allow such activities, like memorandums of understanding, letters of intents, special insurance contracts, should be provided. Any activity that has not been previously and officially endorsed by the local industry and the Chapter management will not be considered appropriate).
- Organize a local game or contest.
- Run a workshop.
- Arrange a forum or event to help people establish professional networks
- Organize training and educational activities

Form updated on June 2025