Student Chapter Handbook

2018

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OVERVIEW OF STUDENT CHAPTER HANDBOOK

The Human Factors and Ergonomics Society (HFES) Student Chapter Handbook is designed to provide guidance and assistance to HFES student members in organizing student chapters.

The Handbook provides information for both starting new chapters and operating existing chapters. The handbook is compiled, published, and revised as necessary by the Student Affairs Committee of the Human Factors and Ergonomics Society.

This handbook is designed to provide the following information:

- Why organize a Student Chapter?
- How to organize a Student Chapter
- What resources are available to your chapter?
- What types of activities take place in Student Chapters?
- What are general benefits of being a Student Member of HFES?

STUDENT CHAPTERS OF HFES

A Student Chapter of HFES is a group of students interested in human factors and ergonomics who organize to coordinate events and activities for the benefit of the students, the community, and HFES. The student chapter operates under the auspices of HFES and receives support from HFES for its activities.

Benefits of Having a Student Chapter:

- Enhances student participation in HFES by providing opportunities for professional development, community service, and networking with other students and faculty interested in human factors and ergonomics issues.
- Provides a forum for the presentation, discussion, and investigation of human factors and ergonomics issues.
- Provides a student forum for discussion of school-related issues and HFES policies that affect student members.
- Provides directory and news bulletin information for local use and as input to the student column in the HFES *Bulletin*.
- Enables access to funds provided by HFES to support student chapter activities such as invited speakers, colloquia, field trips, and other projects.
- Encourages local participation by students interested in human factors and related fields that might not attend the annual meeting.
- Encourages individuals to become student members of HFES.
- Promotes awareness of HFES and human factors/ergonomics on campus.

ORGANIZING A STUDENT CHAPTER

Member Recruitment

To start a student chapter, you must have a minimum of 15 students who are interested in joining the chapter. At least three of these students must be student affiliate members of HFES. Try to recruit students from a variety of programs on campus such as industrial engineering, engineering psychology, cognitive science, industrial/organizational psychology, occupational therapy, physiology, health and performance, and so on.

Getting a Faculty Adviser

The student chapter must have a faculty adviser who is a Full Member of HFES. This person will provide guidance for the development of chapter activities and will help oversee expenditures related to chapter activities.

College/University Permission

To be eligible for consideration as a student chapter, you will have to obtain a letter from your host-college or university stating that the proposed student chapter has permission to organize.

Develop Constitution and Bylaws

The constitution for the student chapter is a general statement of the purpose and affiliation of the student chapter. (A sample is presented in Appendix B.)

The Bylaws are the details of the name of your chapter, membership requirements, officer descriptions and duties, government, and meeting guidelines. (A sample is presented in Appendix B.)

The last page of the Constitution and Bylaws must include the signatures of the members who have approved the Constitution and Bylaws, the percentage of the membership they represent, and the date of approval.

(NOTE: Use the models presented in the appendices and adapt them to your specific chapter. The chair of the Student Affairs Committee will assist you if you have any questions.)

Application to HFES for Affiliation

Applying to HFES for official approval of your student chapter requires that you submit the following items:

- A cover letter stating your interest to be considered for affiliation as a student chapter of HFES.
- A letter of support from the faculty adviser of the chapter. For the new officer roster, contact information for the chapter and a description of the calendar-year activities.
- A list of members of the prospective chapter including the name, address, and membership class in HFES for each member. (Note: this list must include a minimum of 15 students plus the faculty adviser)

- A letter from the Host College or university stating that the proposed student chapter has permission to organize.
- The Chapter Constitution and Bylaws. **(The last page of the Constitution and Bylaws must include the signatures of the members who have approved the Constitution and Bylaws, the percentage of the membership they represent, and the date of approval).**
- A complete list of the interim or elected officials and the date of their election. **The president, treasurer, and one other officer must be HFES student affiliate members**. In the case of interim officers, a schedule for nominating, electing, and installing officers for the first year of chapter operation should also be provided.

Send an Electronic file of these materials to Drs. Linsey Steege and Farzan Sasangohar. Send a copy and a Word file of the chapter Constitution and Bylaws to Director of Member Services, Carlos de Falla, carlos@hfes.org.

Linsey Steege, Ph.D.
Chair, Student Affairs
lsteege@wisc.edu

Farzan Sasangohar, Ph.D.
Co-Chair, Student Affairs
sasangohar@tamu.edu

Drs. Steege and Sasangohar will review the application materials and work with you to verify that the formal requirements have been met. Once the application is complete, the application will be forwarded to the HFES Executive Council (EC) with the recommendation that it be approved at the next EC meeting. The EC meets two times a year, generally in spring and in conjunction with the HFES Annual Meeting.

HOW TO KEEP THE CHAPTER ALIVE FROM ONE ACADEMIC YEAR TO ANOTHER

Election of Officers

It is critically important for the student chapter to elect new officers by the end of the spring quarter or semester so that an orderly transition can take place.

Officer Transition

Ideally, an officer transition should be strategically scheduled near the end of the term, which is a good end point for the old officers' term and the beginning of the new officers' term. The transition itself should allow adequate time for all officers to meet as a group and with their adviser.

Other Transitional Issues

The outgoing officers with the incoming officers should cover the following topics.

- Student Chapter Bylaws.
- Providing a new officer roster to HFES. In November, HFES will mail a request to the student chapter president for the new officer roster, contact information for the chapter and a description of the calendar-year activities.

- This information appears in the HFES Directory and Yearbook and must be received by the HFES Central office by mid-December.
- Student chapter e-mail. Each Student Chapter is strongly encouraged to create an e-mail account with a screen name that can be used from year to year by incoming officers, (i.e., hfes@psu.edu).
- Access to student listservs. (See page 13)
- Officer roles and responsibilities.
- Registering your organization with the University.
- Funding sources (Graduate Student Assembly, HFES, your department).
- Graduate student assembly relations and university involvement.
- Checking account and expenditures.
- Access to and restrictions on funding.
- Reserving a room for a meeting.
- HFES membership and student chapter membership.
- Speakers, information about inviting, how to pay for, etc.
- Deadlines (e.g., Summary of Chapter Activities to HFES, Student Organization).
- Registration, (University Funding Application).

FUNDING FOR STUDENT CHAPTERS

Annual Funding Available from HFES

An HFES fund has been established to encourage program activities in the student chapters. Possible activities include inviting outside speakers, field trips, and interdisciplinary symposia. Supported activities must benefit a majority of the members of a student chapter. A chapter's support may be spent on one event, or distributed across several events. No annual meeting travel may be funded. There is a $450 allocation in 2018 for HFES Student Chapters. **Submit funding proposals before March 30, 2018.**

Additional Funding Available from HFES

Some years, there will be student chapters that for one reason or another do not use all of their allocated funds. On the other hand, there are other student chapters (e.g., those that are located long distances from major metropolitan areas) that expend all their allocated funds on travel expenses for one or two speakers. To accommodate this disparity, the Executive Council has agreed that student chapters that spend the entire allocated $450 and have a need for additional funds may apply for those additional funds when that money is available. Student chapters may send the request for additional funding by October 1.

How to Request Funding from HFES

STUDENT CHAPTERS MUST SUBMIT A PROPOSAL PRIOR TO THE EVENT to the Chair of the Student Affairs Committee for these funds; the money is not automatically allocated. The proposal must include an outline of proposed activities and expenditures and must include the written endorsement of the chapter adviser. **See Appendix C for Question and Answers on Student Funding**.

This proposal may be e-mailed if sent by the faculty adviser. Upon approval, the Chair will notify the benefiting chapter and the HFES executive director.

If advance funds are needed, contact Interim Executive Director Julie Freeman, julie@hfes.org.

After your event has taken place, the student chapter must submit a brief written report and financial accounting to the Chair of the Student Affairs Committee. Receipts and request for reimbursement should be sent to the Student Affairs Chair who will then forward the approved request to HFES for reimbursement. Requests for reimbursements must be made by the dates specified in the call for budget proposals.

Very important: Please be sure to include the name of the person to whom the check should be made payable and the address to which the check should be sent.

Sample Activities That May Be Funded:

- Guest speaker.
- Field trip - even if all members of the student chapter cannot go on the trip, this type of expenditure can be approved if those members who do take the trip make a report at the next chapter meeting.
- Small conference.
- Design competition.
- Refreshments for chapter meeting.
- Books or other materials that would be available to all members of the student chapter. For example, one chapter has developed a resource library of materials that student chapter members can access.

Reasonable Expenses

Expenses for student chapter program activities should be reasonable. These expenses can include: travel and related expenses (e.g., lodging, meals), for the speaker, meeting room costs, refreshments for the breaks of a chapter-sponsored symposium, and car/van rental costs for field trips.

Expenses related to the annual meeting, however, are excluded. Since the purpose of the funds is to encourage program activities with the maximum participation by the student members, travel expenses to the annual meeting do not qualify.

It is the Society's policy not to reimburse anyone for travel to the annual meeting. Other means (e.g., serving as a volunteer at the annual meeting, school funds, etc.) are available to defray costs associated with attendance at the annual meeting.

Other Sources of Funding

Besides HFES, there are other possible sources of funding:

- Some student chapters charge modest dues ($5).
    - Numerous student chapters receive small grants from their department
- Funding is also sometimes available from Student Affairs/Student Government groups on campus.

RESOURCES FOR STUDENT CHAPTERS

Whether you have a simple question about your chapter or you're faced with a big problem, we encourage you to take advantage of the numerous people and resources available to you:

Faculty Advisers

Each student chapter has a faculty adviser who is a Full Member of HFES and has probably been involved with your chapter longer than you have. This adviser is your best source of wisdom, especially concerning the chapter's relationship to your university and to HFES.

Chair of the Student Affairs Committee

The Chair of the Student Affairs Committee is an HFES Member appointed by the HFES President to watch over and advocate for student affairs. The Chair of the Student Affairs Committee reports to the Executive Council at each of their meetings. The current chair can be contacted about any student issue concerns.

HFES Office

Julie Freeman, HFES Interim Executive Director, may be contacted at **julie@hfes.org** about reimbursement of chapter expenses.

Carlos de Falla, HFES Director of Member Services, may be contacted at **carlos@hfes.org** about any student issue concerns, HFES membership, and change of office updates. A Word file of the Chapter Constitution and Bylaws are also to be sent to him.

Student Chapter Presidents/Advisers Listserv

HFES Central Office maintains a listserv called **hfes-studentchapters@hfes.org** for the benefit of the student chapter presidents and faculty advisers.

Student chapter presidents, faculty advisers, the Chair of the Student Affairs Committee, and HFES senior staff are automatically subscribed to this listserv.

The listserv may be used as a:

- Central source for general announcements relevant to the student chapters
- Opportunity to interact with other student chapter officers.

Messages to the listserv should be addressed to **hfes-studentchapters@hfes.org.** Email address changes should be sent to **carlos@hfes.org.**

Each Student Chapter is strongly encouraged to create an e-mail account with a screen name that can be used from year to year by incoming officers, (i.e., hfes@psu.edu).

Other Student Chapters

If you were having an event, it would be nice to inform nearby chapters and invite them to participate (e.g., for invited colloquia or social events). You may also plan a field trip to visit nearby student chapters and tour their facilities. The student chapter officers' listserv described above will be a useful tool for communicating with other student chapters. Your fellow students are a valuable resource.

SAMPLES ACTIVITIES FOR STUDENT CHAPTERS

Recruitment (Increasing Chapter Membership)

- Opening social after the new student orientation
- Open enrollment signup sheet
- Visit HF/E and related classes to talk about HF/E
- Participation in campus recruitment events
- Bulletin Board for HFES chapter announcements

Student Membership to HFES

- Encourage HFES student chapter members to go to the HFES Annual Meeting via email postings
- Distribute brochures and flyers about benefits of affiliation with the Society
- Presentation on student benefits for joining HFES as well as student chapters

Guest Speakers: List of General Topics

- Cross Cultural User Experience Design
- Human Factors of Spaceflight
- Industrial Design
- Outreach Opportunities
- Ideas about activities for HF/E involvement
- Human Machine Integration
- Usability Researchers
- Career Center
- Interaction Design
- Student Speakers (Alumni)
- Human action integrated into design
- Traffic Safety
- Professors in the HF/E department from other universities
- Experts in Medical field relating to HF/E
- Members from HFES
- Human Computer Interaction
- Cultural Ergonomics
- Pedagogy
- Preparing Proposals Seminar
- Interviewing Skills
- Dissertation Tips and Tricks
- Grant Writing for Grad Students and Faculty–Tips
- Student speakers practicing for defense
- Panels of students and faculty presenting grad life and the application process

- Invite a guest speaker who is an expert witness to talk about the profession
- Safer in the air: An analogy between aviation and medicine
- Technology with living disabilities
- Tour of Duke's patient simulation research lab
- Global and cultural awareness and the impacts on design
- Distance education
- Team communication
- Physiological measures
- Lecture that serves as a primer for a common HF/E tool or application, such as Viseo or Morae or Photoshop.
- A panel where professionals would ask students why they would want to be in academia or industry. It is a method for professionals to investigate current thinking of the future generations of professionals

Students Service to HFES

- Write articles regarding HFES activities/involvement
- Student contributions to HFES Bulletin
- Host HFES chapter meetings locally (your city)
- Submit Thesis Topics to discuss at the conference

Outreach/Volunteerism

- Form a HF public relations team
- Students providing HF/E consulting to other campus organizations (web design, etc.) or companies for donations
- Participate in on and off campus special day festivities to promote HF/E
- Gather contact information from students in other departments (computing, industrial design, architecture, language, culture and communication) in order to recruit
- Listservs to disseminate information about upcoming events, available job positions, and reminder emails
- HFES student chapter events added to university calendar (e.g. National Ergonomics Month)
- Go to middle schools and/or high schools to promote HF/E
- Presentations of HFES to different university departments
- Posters around campus of HFES student chapter events/activities
- Chapter donation of supplies to local efforts: School supplies to Iraqi children
- Chapter web site design project as a networking tool for current students and alumni
- Graduate school preparation and mentoring / information session for undergraduates
- Participate in University-wide open house events
- Habitat for humanity
- Student Mondays: panels that address topics such as: The Internship Experience, How to Publish, How to get a Job in Academia, Industry, and Government and Experience from Leaders in the Field.
- Trash pick up days: Local Beaches, Parks, etc
- Volunteers for Arbor Day
- Campus usability audit
- Ergonomic Assessment of a facility or classroom on campus
- Usability Day celebration and panel discussion
- Participation in and donations to school fundraisers

Collaboration:

- Different departments within university (i.e. Industrial Design Department or Psychology Department)
- HF conference with other (nearby) university HF programs. Students present research.
- Industries in the community related to HF/E
- Seminar on how to collaborate across disciplines
- Seminar on Stress Management w/ university counselor

Socials:

- Welcoming events for new students
- Meet at restaurants
- Campus events to promote student involvement
- Holiday Parties for HF/E students and department staff
- Take experts in HF/E out to dinner
- Alumni meetings
- Happy Hours
- Weekly officer meetings
- Mentor Partnerships (new HF/E students partner with experienced students)
- Online discussion boards
- Picnic in the park
- Wine tasting social
- Ball games
- Pizza and dessert sale
- HFES coffee shop hours in a research lab
- Alumni dinner
- Sporting events w/ members
- Smash Pumpkin Carving Contest w/Engineering Department
- HFES Library Grand Opening
- Morning Coffee
- Game Nights (e.g. Wii Party)

Field Trips:

- Ergonomics Companies
- Psychology Laboratories
- Human Factors research facilities
- Company's near campus involved with HF/E
- Middle Schools and High schools to promote HF/E
- Visits to local chapters: Research presentations and lab tours
- Tour of an automobile manufacturer
- Tour of transportation research facilities e.g. Intelligent Transportation Systems
- Tour of design firms
- Risk management retreat
- Tour of Aircraft Manufacturing Co.
- Tour of local airports

Committees

- Newsletter
- Website

- Wikis
- Student Reviewers
- Student chapter message board
- Forums

Exploration/Creativity

- Real world activities that focus on HF related topics
- Design a student chapter logo contest
- Open house
- Virtual haunted house
- Calendars given to new members with dues payment
- Book drives
- "Bad designs on campus" contest
- Online Courses Usability Evaluations
- HF Games, e.g. Egg drop event, follow up discussion for relevant HF principles
- World of Illusions Booth
- Muffin Giveaway Booth
- T-Shirt Design Competition
- Student Awards
-

Information Dissemination

- HFES student chapter website
- Mailing List: Announcements of upcoming HFE events
- Banners and Flyers Posted around university campus
- Newsletter
- Yahoo Groups
- Facebook Group for local chapter
- Chapter Meetings
- Display Cabinet in Engineering Department

Mentorship

- Offer mentoring to new students
- Mentoring Future chapter officers by having "ride-along" training sessions with current officers
- Thesis Café: Students get the opportunity to talk to other students and alumni about their thesis/project interests
- Recent Graduates talks about experiences doing their thesis/project
- Panel of Chapter Members Attend New Student Orientation
- Email to new students regarding the effects of excessive stress on human performance and other "HF/E news you can use"
- Tutoring undergraduates at the university

Continued Improvement

- Soliciting donations from Alumni members of the chapter
- Development/maintenance of the HFES chapter library
- Send speakers to other student organizations to promote HFE in other fields
- Maintain connections with faculty and students in departments related to HFE

AWARDS

Student Chapter Award

Outstanding Student Chapter is a special status for Student Chapters of HFES. The purpose of this designation is to honor Student Chapters that have made an outstanding contribution to the discipline, HFES, their campus, or their community. Selections are announced at the Student Reception of the HFES Annual Meeting.

The application for the Student Chapter Award may be found in Appendix D.

Requests for more information should be sent to:

Linsey Steege, Ph.D.,
Chair, Student Affairs
lsteege@wisc.edu

Farzan Sasangohar, Ph.D.
Co-Chair, Student Affairs
sasangohar@tamu.edu

GENERAL BENEFITS OF STUDENT AFFILIATE MEMBERSHIP IN HFES

Becoming an HFES Student Affiliate Member

Any person who is enrolled as a full-time undergraduate or graduate student at an accredited college or university and is not working full-time is eligible to become a Student Affiliate of the Society. Student Affiliates are entitled to participate in all activities of the Society except that they may not vote or hold office. Student Affiliate dues are for the period January-December and include subscriptions to *Human Factors, Ergonomics in Design*, the *Journal of Cognitive Engineering and Decision Making*, and *Proceedings of the Annual Meeting and Health Care Symposium*.

Technical Group Membership

HFES is divided into 24 interest groups referred to as Technical Groups (TGs). (See Appendix G for a full description of the TGs.)

Membership in a TG provides the opportunity to interact and network with others interested in similar technical areas. TGs produce newsletters and often maintain listservs and web sites for the benefit of their members. The TGs are also responsible for the Technical Program at the HFES Annual Meeting. Many TGs have awards specifically for students.

If you wish to join a TG, simply log in as a member and join online or download a TG membership application from http://hfes.org. Membership costs for most TGs range from $4 to $7 and you do not have to be a member of HFES or of an HFES Student Chapter to join a TG.

Student Listserv

HFES operates a listserv for HFES Student Affiliate Members. The server provides:

- A central source for general announcements relevant to HFES Student Members.
- A potential source of job information.
- An opportunity to interact with other Student Affiliate Members of HFES, creating a network of contacts worldwide.
- A chance to ask human factors questions (e.g., where to obtain information relevant to a thesis or dissertation project, design questions).

HFES Student Affiliate Members are added to the listserv when they join or renew their membership.

Messages to the listserv should be addressed to hfes-students@hfes.org.

Transitional Dues

Student Affiliate Members who graduate are automatically upgraded to Transitional Associate Member status and are entitled to pay one-half of the regular dues for the first two years out of school.

Career Center

HFES operates an Online Career Center exclusively for HFES members. Members can log in and may post resumes at no charge and may apply for jobs on-line. The Career Center may be accessed at the HFES Web site at http://hfes.org.

Student Awards

- **The Alphonse Chapanis Best Student Paper Award** (established in 1969 as the Best Student Paper Award, and renamed in 1983), provides a certificate and a total monetary award of $2000 to a student (or students) who present(s) the most outstanding student paper at the HFES Annual Meeting. Candidate papers are reviewed and ranked on the basis of subject-matter relevancy, methodological sophistication, clarity of written expression, and oral presentation of the material. Written papers are prescreened so that generally no more than six papers will be selected for final judging by the subcommittee during oral presentation by the student authors.

- **Student Member with Honors** is a special designation for HFES Student Affiliate Members, which honors students who have made an outstanding contribution to the discipline or HFES. An application for this award may be found in Appendix D.

- **Student Author Presentation Support Award**, sponsored by the Council of Technical Groups, focuses on students in financial need who have a paper accepted for a poster or lecture presentation at the Annual Meeting. The program is announced in the HFES *Bulletin*

- **First-Year Student Travel Honorarium Program** helps support students entering HF/E academic programs to travel to the Annual Meeting. The honorarium requires matching funds and is designed to support first-year, nonpresenting students who would not normally attend the meeting due to limited resources.

- **TG Student Awards**. Many of the technical groups sponsor student paper awards. Details of the awards are published in technical group newsletters or via their listservs each year.

Annual Meeting Activities

- **Volunteering**. Students are invited to volunteer to assist in the Annual Meeting coordination on-site. In exchange for volunteering four or eight hours, students will be reimbursed half or the full registration fee after the meeting.

- **Student Reception.** HFES sponsors a reception at the Annual Meeting for all of the student attendees. Also invited to the reception are members of the HFES Executive Council, Student Chapter advisers, and selected faculty members. Refreshments are provided and announcements pertaining to students are made here.

DISAFFILIATION

There may come a time when your Student Chapter just isn't viable any longer. For whatever reason, if your Student Chapter becomes inactive or if there aren't enough students to make the transition from one academic year to another, please contact the Chair of the Student Affairs Committee to discuss the situation. Hopefully, it can be resolved.

However, if a decision is made to close down the chapter, you must send a written request for disaffiliation to the Chair of the Student Affairs Committee. This request must be signed by a majority of the current chapter officers, and the faculty adviser and must include a copy of the notification to the membership that disaffiliation is being requested. The Student Affairs Committee will review the request and then forward it along with relevant information and appropriate recommendations to the Executive Council for decision.

In extreme cases, the HFES Executive Council may terminate the affiliation of a chapter for failure to submit annual reports for two or more years in succession, failure to comply with its own chapter Bylaws, disaffiliation with its host institution or conduct prejudicial to the interests and objectives of the Society.

APPENDIX A

HFES CENTRAL OFFICE SUPPORT

Following are the names and contact addresses for the administrative staff at the HFES central office:

Interim Executive Director:
Julie Freeman
julie@hfes.org

Susan Marshner
Administrative Assistant
susan@hfes.org

Communications Department

Communications Director:
Lois Smith
lois@hfes.org

Steve Stafford
Senior Production Editor
steve@hfes.org

Member Services

Director of Member Services:
Carlos de Falla
carlos@hfes.org

Stefanie Alexander
Member Services Coordinator
stefanie@hfes.org

Mailing Addresses

HFES address for US Postal Service mail:
P.O. Box 1369
Santa Monica, CA 90406-1369

HFES physical address *for most overnight delivery services (**NOT** US Postal Service Express Mail):*
1124 Montana Ave., Suite B
Santa Monica, CA 90403-1617

HFES Website*:* http://hfes.org

APPENDIX B

SAMPLE CONSTITUTION AND BYLAWS

(Bylaws updated May 2011)

Constitution

University of _____ HFES Student Chapter

The University of _____ HFES Student Chapter is organized to serve the needs of the human factors profession at the University of _____. Its purpose is to promote and advance the understanding of the human factors involved in the design, manufacture, and use of machines, systems, environments and devices of all kinds through the interchange of knowledge and methods in the behavioral, biological, and physical sciences and in industrial, computer science and other relevant engineering disciplines.

The University of _____ HFES Student Chapter is established as an affiliate of the Human Factors and Ergonomics Society, Inc., a nonprofit corporation chartered by the State of California, to operate exclusively for charitable, educational, scientific, and literary purposes by authority of and in accordance with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society now in force or hereafter amended.

Bylaws

University of _____ HFES Student Chapter

Article I - Name
The name of this organization is "The University of _____ HFES Student Chapter".

Article II - Purpose
The University of _____ HFES Student Chapter, hereinafter referred to as the Chapter, is an affiliate of the Human Factors and Ergonomics Society, Inc., a nonprofit corporation chartered by the State of California. Purposes of the Chapter are those set forth in the Articles of Incorporation of the Human Factors and Ergonomics Society, Inc., hereinafter referred to as the Society.

Article III - Membership

Section 1. Classes of Membership.
The voting membership shall include Members and Associates of the Chapter.

Section 2. Qualifications for Membership.

a. Member. Members are students, faculty or staff at the University of_____ who show an interest in the field of human factors and complete the Chapter's application process.

b. Associate. Associates are those persons active or interested in human factors or related fields but who do not qualify for election to the grade of Member.

Section 3. Application for Membership. Persons who wish to apply for membership shall submit a written or electronic application to the Chapter Secretary on a prescribed form. This form must include acceptable evidence of the applicant's qualifications for either member or associate status.

Section 4. Privileges.

a. Members. Members in good standing shall be entitled to vote, receive notices, participate in all activities of the chapter, receive one copy of all chapter publications, and have a hearing before termination. Only members shall be able to hold office.

b. Associates. Associates in good standing shall be entitled to all privileges of Membership except that they may not hold office.

Section 5. Termination of Membership. The membership of a person in the Chapter may be terminated at any time by voluntary resignation, or by involuntary termination by a two-thirds vote of the full Executive Council. Sufficient causes for involuntary termination include: 1) failure to pay dues for one year, or 2) conduct prejudicial to the purposes of the Chapter (for which an appeal may be made to the Executive Council, if requested in writing 30 days from receipt of notice of termination).

Section 6. Reinstatement of Members. Procedures and conditions for the reinstatement of members shall be established by the Executive Council subject to the requirements of the other pertinent Sections of this Article.

Section 7. Dues. Annual dues for membership shall be established by the Executive Council.

Article IV – Officers

Section 1. Designation.

- President
- Vice President
- Secretary
- Treasurer
- Communications Director
- Chapter Adviser

The president, treasurer, and one other officer must be student affiliate members of HFES.

Section 2. Duties of Officers. The officers of the Chapter shall perform the regular and customary duties of their offices and other duties that may be required of them by the Executive Council, Chapter Bylaws, or the Human Factors and Ergonomics Society.

a. President. The President shall be the chief executive officer of the Chapter and shall be a member of the Executive Council. The President shall preside over meetings of the Chapter and the Executive Council. The President shall appoint, with the advice and consent of the Executive Council, all committee chairmen not otherwise specified in these Bylaws.

b. Vice President. The Vice President shall act as an understudy to the President, and become acquainted with the business and operations of the Chapter. The Vice President shall assume the duties of the President during the President's temporary absence, or in the event that the President is not able to perform his or her duties, as determined by a two-thirds vote of the Executive Council. The Vice President shall be a member of the Executive Council.

c. Secretary. The Secretary shall keep a true and faithful record of all business meetings of the Chapter and of the Executive Council. The Secretary shall be the custodian of all records and correspondence of the Chapter and shall maintain the membership list and other mailing lists pertinent to Chapter business. The Secretary shall be a member of the Executive Council.

d. Treasurer. The Treasurer shall be responsible for the money and securities of the Chapter. The Treasurer shall keep a true and faithful record of all financial transactions and shall prepare the annual financial status report, which shall correspond to the same fiscal year as the Society. The Treasurer shall deposit Chapter funds to the account of the Chapter in a bank or trust company selected by the Executive Council. The Treasurer shall disburse such funds only upon approval by the Executive Council.

e. Communications Director. The Communications Director shall be responsible for creating and maintaining electronic and written forms of communication within and beyond the Chapter. Such forms may include a periodic newsletter and a website. The Communications Director shall be a member of the Executive Council.

f. Faculty Adviser. The Faculty Adviser shall be responsible for the academic oversight of the Chapter. Specific duties include facilitating interactions between the Chapter and the university and communicating with the national organization as needed. In addition, the Faculty Adviser shall be responsible to initiate an impeachment process for an incumbent officer who fails to fulfill his or her responsibility to the Chapter. **The Faculty Adviser must be a Full Member of HFES.**

Article V - Executive Council

The affairs of the Chapter shall be managed by the Executive Council, which shall consist of the elected Officers and the Faculty Adviser(s). The President shall call meetings of the Executive Council at least twice annually to administer the affairs of the Chapter (such meetings may be held in conjunction with regular chapter meetings). The chair of each standing committee shall report at these meetings.

Article VI - Election Of Officers

Section 1. Nomination. At least two weeks prior to the Annual Business Meeting of the Chapter, the Chair of the Membership, Nominations and Elections Committee shall issue a call for nominations to all Members in good standing for the offices to be filled. One week after the date nomination ballots are sent, nominations from the membership shall be closed and the Executive Council shall begin to prepare the election ballot. This ballot shall include, for each office, the names of the person(s) who received the largest number of nominating votes and who are both eligible and willing to stand for that office, as determined by the Executive Council. If any nominee is ineligible or unwilling to stand for office, the name of the person who ranks next in nominating votes, and who is eligible and willing to serve for that office shall be substituted. At a minimum, at least one

nominee and space for a write-in candidate should be provided. If no nominees are identified for a given position, the Executive Council may make additional nominations.

Section 2. Election. After the closing of nominations, the Executive Council shall distribute the election ballot to all Chapter Members in good standing. After a suitable period to collect votes, the Executive Council shall close the election and count the votes. The candidate for each office who receives a majority of the votes cast shall be elected. Tie votes for any office shall be resolved by drawing lots. The incumbent President shall notify the winning candidates of their election and shall direct that their names be published within 45 days in any publication distributed to all Chapter members. The President shall further direct that names of the newly elected officers be forwarded to the Chair of the Student Affairs Committee and the Director of Member Services of the Society.

Section 3. Terms of Office. The Officers shall assume their offices on the first day after the close of the Annual Business Meeting of the Chapter following their election. They shall hold office until their successors accept office in their stead, or until the Executive Council shall have declared their office vacant as provided for elsewhere in these Bylaws. The terms of all officers shall be one year.

Section 4. Installation. Election results shall be announced during the Annual Business Meeting of the Chapter and the newly elected Officers installed by the incumbent Officers.

Section 5. Impeachment. The Faculty Adviser shall be responsible to initiate an impeachment process for an incumbent officer who fails to fulfill his or her responsibility to the Chapter. An officer may be removed from office after the impeachment process is initiated by the Faculty Adviser with a two-thirds vote of the current Executive Council. Impeachment should be considered a last resort and should only be initiated after other appropriate methods of conflict resolution have been pursued.

Section 6. Eligibility and Vacancies. **The President, Treasurer, and any third officer shall be a Student affiliate member of the Society.** The Chapter President may not hold more than one elective office concurrently. The Executive Council shall consider the failure of any incumbent to perform the duties of his or her office from disability or other circumstances and may decree the office vacant by a two-thirds vote. In the event that a position becomes vacant mid-term, the Executive Council may appoint an appropriate qualified member to assume the duties of the vacant office until that vacancy is filled at the next election. The maximum number of offices that any one person may hold is two.

Article VII - Committees

Section 1. Special Committees. Special committees may be determined by the President with the advice and consent of the Executive Council. The selection of Committee Chairs, the status of each Special Committee, and the period of continuance of each Special Committee, shall be determined by the President with the advice and consent of the Executive Council. Except as otherwise provided for in these Bylaws, the Chair of each Committee shall select and appoint such Committee members as are necessary to conduct the affairs of the Committee. Chairs and other Committee Members shall normally serve from the time of their appointment until the close of the next Annual Business Meeting.

Article VIII - Meetings

Section 1. Types. There shall be Regular Meetings of the Chapter and of the Executive Council. Chapters may hold these meetings in person or electronically, with the exception of the Annual Business Meeting, which must be held in person.
Section 2. Regular Meetings of the Chapter. The Chapter shall hold no less than three Regular Meetings each year. One of these shall be designated the Annual Business Meeting. The selection of the time and place of each meeting shall be designated by the Executive Council or its delegated representative for this purpose. Announcements for each meeting shall be posted not less than three days prior to the meeting date.

Section 3. Quorum. Fifty percent of the voting members of the Chapter present shall constitute a quorum at any Regular or Special Meeting of the Chapter. Any meeting at which a quorum is present may, by a two-thirds (2/3) vote, order the submission of any question, except one affecting the Bylaws of the Chapter, to the Executive Council or to the voting members. A quorum need not be present to adjourn a meeting.

Section 4. Executive Council Meetings. Meetings of the Executive Council shall be called by the President or the Faculty Adviser at least twice annually. The President may request the attendance of any Committee Chair or member to present or receive reports and recommendations pertinent to the conduct of the Chapter affairs. Such meetings may be held in conjunction with regular chapter meetings. The chair of each standing committee shall report at these meetings. A simple majority of the members of the Executive Council present shall constitute a quorum.

Section 5. Parliamentary Authority. The rules contained in *Roberts' Rules of Order* shall govern the Chapter in all cases in which they are applicable, and in which they are not inconsistent with the Chapter or Society, or the body of standing rules or rules of order of the Chapter.

Article IX - Fiscal Accounting

Section 1. Accounting. The Chapter shall keep a record of all money received and paid out on the basis of the same fiscal year as designated by the Society. Chapter funds shall be deposited to the account of the Chapter in a bank or trust company selected by the Executive Council.

Section 2. Financial Report. The Treasurer shall submit an annual report to the Executive Council of the Chapter and shall also present a financial status report at the Chapter's Annual Business Meeting. In addition, the treasurer shall present periodic reports at regular meetings of the Chapter. The Chapter Treasurer shall prepare budget proposals and reimbursement requests which include the corresponding event / activity report for submittal to the Society's Chair of the Student Affairs Committee. If requested by the Chair of the Student Affairs Committee, the Treasurer shall prepare an Annual Financial Report for submittal to the Executive Council of the Society.

Article X - Amendments

Section 1. Proposal. Motions to adopt, amend, or repeal Chapter Bylaws shall be submitted in writing to the Secretary and shall bear the signatures of at least three members of the Chapter or Executive Council. Motions shall be distributed by the Secretary to the Executive Council within three days for evaluation and voting.

The proposed changes shall be evaluated by the Executive Council to ascertain whether they are consistent with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society. Members of the Executive Council shall be allowed not less than three days, nor more than seven, thereafter to return their votes.

Section 2. Adoption.

a. Motions Approved by the Executive Council. Approval of Motions to adopt, amend, or repeal Chapter Bylaws shall require a two-thirds (2/3) vote of the Executive Council. After approval by the Executive Council, the proposed change shall be submitted to the voting membership of the Chapter, either during the next meeting or by mail or electronic ballot. Motions shall be adopted if approved by a two-thirds (2/3) majority of the Chapter.

b. Motions Not Approved by the Executive Council. In the event that the Executive Council fails to approve a motion, a petition bearing the signatures of at least five voting members shall cause a ballot on the motion to be distributed by the Secretary within five days to all voting members of the Chapter. Voting members shall be allowed not less than three days, nor more than ten days thereafter to return their votes. Voting shall be by secret ballot. Motions shall be adopted, thus overriding any contrary vote of the Executive Council, if approved by a two-thirds majority of all voting members.

Section 3. Society Approval. Any amendment to these Bylaws initiated by the Chapter action shall be submitted in writing within 30 days after its passage to the Chair of the Student Affairs Committee of the Society for approval or disapproval by the Executive Council of the Society.

Section 4. Date of Effect. Adoption, amendment, or repeal of a Bylaw shall take effect immediately upon its passage by the Chapter and approval by the Executive Council of the Society, and shall be announced immediately to all members by the Secretary.

Article XI - Compatibility Of Bylaws

These Bylaws shall be compatible with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society; and any deviation there from is null and void.

Article XII – Dissolution

The Chapter may be dissolved according to procedures described in the Operating Rules of the Society. In the event that the Chapter dissolves, any funds not absorbed by the institution are to be disbursed to HFES.

APPENDIX C

QUESTIONS AND ANSWERS ABOUT STUDENT CHAPTER FUNDING

To help facilitate chapter events, you can request financial support from HFES. Make sure that you reference and follow the suggested budget proposal template. (Sections in purple are examples and should be replaced by your text. The primary headings are for your guidance.) Contact Student Affairs Chair if you have specific questions not addressed here.

Key Summary Points:

- HFES has established a fund to encourage program activities in the student chapters.
- The funds are distributed on a calendar year basis—funding is NOT automatic and is limited to the amount allocated to Student Chapter Activities designated by HFES.
- Send your proposals for 2018 funding to the Student Affairs Chair and Co-Chair (lsteege@wisc.edu and sasangohar@tamu.edu) **before March 30, 2018**. The sooner the better. Funds are dispersed on a combination of a "first-come first-served" and "demonstrated need" basis.
- There is a two-phase reimbursement deadline (please see below for details).
- HFES funds can make a big difference--apply!

Note: Information about the number of Local and National Members is required before your budget will be approved.)

Q: How do I get funds for 2018?

Who is eligible?

All recognized student chapters are eligible for a maximum of $450 allocation in the 2018 calendar year (original proposal). Funding is NOT automatic and is limited to the amount allocated to Student Chapter Activities designated by HFES. As such, we are asking that you create a budget proposal with an honest evaluation of what you expect to complete for the year that goes above and beyond what you would be able to do as a chapter without additional support. (All established chapters should be supporting some of your own activities and events.)

It is important to understand that the chapter allocation is not automatic, and the amount allocated is matched to the amount spent (documented with receipts) up to the maximum approved (which may not be the entire amount requested). Please do not just automatically ask for the maximum amount. Last year, we had multiple student chapters ask for the maximum amount, but then not request any reimbursements. This reduces the level of support that can be given to other chapters and may result in your student chapter having to provide additional justification for why it should be funded in the following year. Determine your actual needs that are not covered by your dues and your current account balance, and then ask for that amount. (The attached template provides an example of how to document what the requested funding will be used for.)

What is the money for?

Various chapter activities may be supported by the funds, such as speaker travel, speaker gifts (must be under $50 and not in the form of money—cash, checks, money orders, or equivalent), field trip expenses such as transportation, refreshments for chapter meetings, design competition awards, books and other resources made available to all chapter members, meeting room costs, and the like. The idea is to use these funds to support activities available to **all** chapter members, to enable chapter growth, and to encourage students to be active in the chapter. The funds you request can be for a single event, or distributed across several events. Note that expenses related to the annual meeting are not eligible for reimbursement (this includes chapter sponsored social or networking events during the annual meeting). The key is that the funds can only be used for activities **open** to **all** members.
NOTICE on funds proposed for refreshments, lunch, and dinner: HFES support can be used to fund refreshments, and to supplement breakfast, lunch and dinner for particular events. However, the per-person cost associated with the purchase of food for these events must be less than or equal to $5 per person. When requesting reimbursement for food items, please make sure that the estimated number of attendees is included and remember that alcoholic beverages are not eligible for reimbursement.

How do you apply for funds, and when?

You must submit a proposal, prior to your applicable events, to the Student Affairs Chair and Co-Chair, e-mails: lsteege@wisc.edu and sasangohar@tamu.edu) for the year 2018, with the deadline of **March 30, 2018**. However you can also submit the proposal sooner than the deadline, to secure funding for early spring activities and events. The proposal must include a brief outline of the proposed activities and expenditures (again, refer to the attached example) as well as a **written endorsement by the chapter's faculty adviser**. Your Faculty endorsement can be provided in two ways: The proposal can be emailed to us by the faculty adviser (preferred) with a note to this effect --this then serves as his or her endorsement of the content. Second, your faculty advisor can provide a physical signature on the budget proposal application and copied on the e-mail that is sent by the student chapter.

Note that regardless of when your chapter changes officers, the HFES funds are dispersed on a calendar year basis, Jan 1, 2018 - Dec 10, 2018 (not school year).

NOTE: Because the funding for HFES student chapters has been reduced this calendar year, a new reimbursement schedule will be adopted:

- All events occurring between January 1 and May 31st must have their reimbursement requests must be submitted by June 15th (you can submit your reimbursement request after each event—you do not need to wait until June 15th to request reimbursements for events). If you do not submit your receipts by the June 15th deadline, you will not be reimbursed for the events and you will forfeit the approved, budgeted amount for those events.
- All events occurring between June 1 and Dec 10th must have their reimbursement requests must be submitted by December 10th (you can submit your reimbursement request after each event—you do not need to wait until December 10th to request reimbursements for events). If you do not submit your receipts by the December 10th deadline, you will not be reimbursed for the events and you will forfeit the approved, budgeted amount for those events.
- No reimbursement requests will be processed after the Dec 10th deadline.

We know that many of you hold elections in the late spring or fall. In these cases, the current chapter officers will be making budget decisions that affect the future officers (at least for part of their term). So, it is often the case that a given group of student chapter officers are both budgeting for funds that future officers will be spending, and receiving funds (earlier in your tenure) that were budgeted by the prior chapter administration. While there's not much we can do about this, since we (the society) must work on a calendar year basis, when new officers take effect, you CAN send us proposed adjustments or modifications to the previously accepted budget for your chapter. These revised proposals need to be in before Oct 12th. (*Reimbursement requests that do not align with the approved budget may not be approved*, so make sure you submit an amended proposal prior to completing activities / expenses outside the scope of the original proposal.)

Again, note that approval is NOT automatic, and you should not assume that you will be approved (or later reimbursed) until you receive written approval from the Student Affairs Chair. On some rare occasions, chapters need additional funds beyond the original $450. These requests should be sent to us, with proper detail and justification, no earlier than June 30 and no later than Oct 12. (Additional funding will be restricted by the continued availability of funds.) -- Note that for the past two years, most of the funding has been allocated during the initial budget proposal submission time period, so do not wait to request funds.

How do we request reimbursement after an activity takes place?

> Save all receipts associated with your activities and document the event. After an activity which had received pre-approval is completed, you will then submit a short description of the activity and your reimbursement request (including scanned copies of all receipts) *directly* to the Student Affairs Chair and Co-Chair, Dr. Linsey Steege (lsteege@wisc.edu) and Farzan Sasangohar (sasangohar@tamu.edu).

This documentation should be sent directly to us, and not to HFES Central (e.g., to Julie Freeman), in order to facilitate a smooth reimbursement process. Once a request is approved, we will send you a message to let you know and will forward the necessary documentation to HFES central. (Please refer to the second attachment, which describes the reimbursement process in more detail.) If you do not hear back from us within two weeks of requesting reimbursement, please double check that we received your request.

We hope this clarifies any questions you have about student chapter funding. It's a great opportunity to obtain supplemental financial support for your chapter activities, and we encourage you to take advantage of it, when needed. We also encourage you to think about using HFES funds for a special activity or form of outreach. *Something you otherwise wouldn't have money to do*!

Example University Student Chapter of the Human Factors and Ergonomics Society

2018 Proposed Budget

Include a short one or two paragraph summary about the chapter and goals / objectives for the year.

The Example University Student Chapter was founded in 1997, and has grown to 24 members (18 students and 6 faculty) as of December 2017. Our chapter strives to inform our members and the community about the relevance and importance of human factors in a variety of domains, what research is being done on our campus, what the latest research challenges are, and where career opportunities may be found. (Etc…)

Our goals for 2018 are to increase student membership by 10-15% and to increase the number of members and non-members who attend out meetings and actively participate in our events. We plan to go on a field trip or plant tour each semester, and host at least one speaker from outside the university at one of our monthly meetings. We also want to start an outreach program through monthly after school activities at a local high school.

Planned Activities and Events (Organized by category and / or semester / month)

For each activity, provide a short description and include an estimate of your expenses. Also state what funding will be used to cover these expenses (National society, local chapter, individual members, etc.) We do want to see what activities your chapter is planning beyond those for which you are requesting national support.

NOTE: HFES national support can be used to fund refreshments, and to supplement breakfast, lunch and dinner for particular events. However, the per-person cost associated with the purchase of food for these events must be less than or equal to $5 per person. When requesting reimbursement for food items, please make sure that the estimated number of attendees is included and remember that alcoholic beverages are not eligible for reimbursement.

Spring 2018:

- **Increase Membership and Student Awareness**: Our student chapter of HFES plans on holding a beginning of the semester "call-out" in January, to inform new students of the opportunities, and promote growth within the society. At this meeting, along with a general discussion of what HF/E is, we will hold a student panel. We are currently planning on having students from Industrial Engineering, Psychology, and Technology speak. The various topics to be discussed include graduate research being done in our departments, and brief conference overviews. ($60 for pizza and soda for 20 members, national support)
- **Field Trips**: We are scheduling a field trip to visit the labs at Wright State University and the Wright-Patterson Air Force Base in conjunction with the Aviation Technology department. Estimated costs are to cover the price of renting a university van for travel to Wright-Patterson AFB. Any additional costs associated with meals during the trip will be the responsibility of the members attending. ($120 for van rental, 1/4 national support, 1/4 local chapter, $5/student)

- Monthly Meetings
- **Etc**: …

Fall 2018

- Fall Callout:
- Field Trip to a Plant:
- Monthly Meetings
- High School Outreach
- **Etc**: …

Summary of Chapter Membership: (*Required*)

Include detailed information on number of members in your chapter, (include information on how many are members locally and nationally), and list what disciplines (majors/ or departments) are represented in your chapter membership and leadership.

Membership Categories	Local Members	National Members	% National Members
Undergraduate	4	1	25%
Graduate	14	12	86%
Faculty / Staff	6	5	83%
Total	**24**	**18**	**75%**

The Example University Student Chapter is composed of primarily students and faculty from our Industrial Engineering and Psychology Departments, with a few members representing Computer Science and Bioengineering. The chapter officers come from both the Industrial Engineering and Psychology programs.

Current Chapter Resources and Planned Support Strategy:

Include: current chapter account balance, dues / member (estimate total for the year), planned fundraisers (including anticipated amounts to raise), department / university / student government support, other…

- Current Student Chapter Account Balance: $315.43
- Dues = $15 / student; $20 / faculty (non-student); estimate $450 for the year
- Fundraiser = Web development / consulting for other organizations ~$50
    - T-shirt sales: ~$75
- No department or university support is available

Activity / Funding Summary: (*You could also create this table in Excel and attach the worksheet*)
Use the provided table to give a summary of expenses and funding sources. Insert columns if necessary.

Activity	Expense Type	Estimated Cost	Description	HFES Support	Student Chapter	Participants' Responsibility
Spring Call-out	Food	$60	for pizza and drinks	$60	-	-
Wright State AFB Trip	Field Trip	$120	van rental at $.35/mile + daily rate	$30	$30	$5 / student (~12 students)
Fall Call-out	Food	$60	for pizza and drinks	$60	-	-
Plant Tour	Field Trip	$100	van rental at $.35/mile + daily rate	$40	-	$5 / student (~12 students)
Monthly Meetings (3/semester)	Food	$20 / meeting	general refreshments (cookies, soda, etc.)	-	$120	-
	Gifts	$15 / speaker	end of year gifts for speakers	-	$90	-
High School – After School Program	Outreach (& gifts)	$135; $45	Supplies and games to teach HF principles. (3-4 small prizes)	$60; $45	$75	
			Total for 2018	**$295**	**$315.00**	**N/A**

By submitting this proposal, our student chapter acknowledges that we have read the 2018 Call for HFES Student Chapter Budget Proposals and the 2018 HFES Reimbursement Process Procedure documents. We are aware that the Student Affairs Chair must approve all events and funding amounts before the event takes place, and that reimbursement requests for approved events must be submitted by:

- June 15, 2018 for events occurring between Jan. 1, 2018–May 31, 2018
- Dec 11, 2018 for events occurring between June 1, 2018– Dec 11, 2018

Approved and Submitted By:

Dr. Name - Advisor: _____

Name - President: _____

Name - Treasurer: _____

2018 HFES REIMBURSEMENT PROCESS

Reimbursement Process- Reimbursement requests for approved events must be submitted by:

- June 15, 2018 for events occurring between Jan. 1, 2018–May 31, 2018
- Dec 10, 2018 for events occurring between June 1, 2018–Dec 10, 2018

1. All events must have received pre-approval from the Chair/Co-Chair of Student Affairs. Events will not be approved for funding after the fact.
    a. If your chapter plans change after receiving budget approval, and you wish to spend allocated funding in a different area, please submit an amended proposal explaining the change. (Give yourself enough lead time to complete the review process before the event.)

       NOTE: Amended proposals are due by October 12, 2018.
    b. Ensure that the expense categories that you are proposing are things that will be reimbursable.
        i. No alcoholic beverages can be reimbursed.
        ii. Travel and expenses relating to the annual society meeting are not eligible.
        iii. Paying speaker honorariums is not allowed (but small token gifts are supported.)
        iv. If you have questions, please check with the Student Affairs Chair.

2. Keep careful records of all expenditures for reimbursement.
    a. You will need to have receipts for reimbursement. (These can be scanned and submitted via e-mail along with your reimbursement request documentation.)
    b. Carefully detail how the budget was allocated (itemized list by categories, e.g. food, speaker gift, van rental for field trip, etc.) and for what aspect(s) you are requesting reimbursement.
    c. Report the total amount to be reimbursed, who the check should be made out to, and the address where it should be sent.

3. Document the event and provide a short description with the reimbursement request.
    a. As a validation for the funding provided to student chapters, we would like to have documentation as to the impact or success of the event.
    b. Note how many people attended (were involved)
    c. Was it an internal or external activity? (Did non-members attend / participate?)
    d. Explain the benefit: (to either your chapter, department, university, community… you can choose what criteria is most applicable for your event.)

e. A second advantage to documenting the events as they occur is that it will be much easier to compile the year's information when applying for Outstanding Chapter honors.

4. Email the short event description, receipts and reimbursement request to the Student Affairs Chair and Co-Chair for approval. (e-mails: lsteege@wisc.edu, sasangohar@tamu.edu)
    a. After it has been approved, your request will be forwarded to Julie Freeman at HFES for processing. Please do not send your request directly to HFES, as it will delay the processing of your reimbursement.
    b. Note: *all reimbursement requests* should be sent *directly* to the Student Affairs Chair, to ensure the smoothest process for everyone involved.
    c. You do not need to wait until the end of the year to request reimbursement. Periodic reimbursement is suggested, rather than waiting until the end of the year.

If you have not received your check within 3 weeks of receiving approval / confirmation from the Student Affairs Chair, please let me know so I can follow up. (e-mails: lsteege@wisc.edu, sasangohar@tamu.edu)

APPENDIX D

STUDENT CHAPTER RECOGNITION

To recognize the contributions and achievements of the student chapters, applications will be judged on the number and quality of activities engaged in across several categories (listed below) with the emphasis on demonstrated excellence in a number of areas. Particular attention will be paid to the quality and outcome of each activity. To be considered for each of the levels of recognition, the student chapter must demonstrate activity in the required minimum number of categories listed for each level. However, activity within each category is not sufficient for the committee to consider the chapter as demonstrating excellence in the category. Excellence within each category will be determined by the quality and outcomes of activities presented, as judged by the awards committee. It is the responsibility of the student chapters to document and present their achievements to the committee in the form of the application.

- **GOLD** requires *activity* in at least eight categories with *excellence* in at least five categories, and at least 50% of the student members (or no fewer than 5 for chapters of < 10 members) also being HFES Student Affiliate members.

- **SILVER** requires *activity* in at least five categories with *excellence* in at least three categories, and at least 40% of the student members (or no fewer than 4 for chapters of < 10 members) also being HFES Student Affiliate members.

- **BRONZE** requires *activity* in at least three categories with *excellence* in at least two categories, and at least 25% of the student members (or no fewer than 3 for chapters of < 10 members) also being HFES Student Affiliate members.

The list of activity categories follows; of primary importance is the quality and outcome of the activity in the category. (Example activities and further description for each category is provided at the end of the document.) The creativity category allows chapters to uniquely define activities and provides an opportunity for some chapters to obtain a recognition level for which they would not otherwise qualify (e.g., if they are a starting or reviving a student chapter).

- Recruitment
- Guest speakers
- Field trips
- Outreach/volunteerism
- Collaboration
- Service to HFES
- Exploration
- Social
- Information dissemination
- Mentorship
- Continuous improvement
- Creativity

Chapters must clearly indicate the recognition level sought (Gold, Silver, or Bronze), provide supporting materials that document the various activities of the chapter in each category, and provide a letter of endorsement from the chapter adviser. We encourage you to submit other materials that will support the application, such as brochures, announcements, or images from events, videos, and Web sites. Please include all supporting material electronically (scanned copies of the original documents is acceptable) as part of the application, and provide a short narrative for that sufficiently details your accomplishments in each category for evaluation.

This is a formal / professional application and should be treated as such. Appearance and usability of the application package do matter and will be taken into consideration. Additionally, while we do encourage chapters to learn from the previous year's submissions each year's application material is considered to be part of the required effort to apply for the award recognition. (Simply reusing previous material could lead to a penalty or possible disqualification.) If you have questions, please ask prior to submission

Submitting Your Application

The deadline for receiving applications for the student chapter awards is ***July 2, 2018***. No applications will be accepted after this date.

The first page of your application should include the following information: chapter president name and e-mail address, student chapter name, recognition level sought, faculty adviser name and e-mail address, mailing address, telephone number, and an outline of your application package. A template of the first page is provided on the next page of this document.

Also be sure to include the letter of endorsement from the chapter advisor as part of your compiled application.

Completed application materials should be compiled and saved as one document. (Preferably PDF, but Word is acceptable.) This application should be sent as an e-mail attachment to Student Affairs Chair and Co-Chair, Drs. Linsey Steege, lsteege@wisc.edu and Farzan Sasangohar, sasangohar@tamu.edu.

Category Information and Example Activity List

The list of activity categories and selected example activities is shown below. (Note that the committee will consider additional activities for each category, with appropriate explanation from the student chapter). The creative category allows chapters to uniquely define activities and provides an opportunity for some chapters to obtain a recognition level for which they not would otherwise qualify (e.g., if they are a starting or reviving a student chapter). *To receive credit for a category, sufficient documentation must be provided for the evaluation*.

- **Recruitment** – increase the number of members in the student chapter. Describe both your process and recruitment results (membership numbers must be given along with the number of new members who have joined, or percent change, where recruitment is emphasized).

- **Guest speakers** – invite outside professionals, professors from other universities, or professors from within the same university. This needs to be a direct result of the student chapter efforts.

- **Field trips –** visit nearby companies, industries, and so on, to learn about new domains, application areas or opportunities.

- **Outreach/volunteerism** – participate in National Ergonomics Month; reach out to fellow students and students in K-12; increase public awareness and promotion of HF/E in general. (Outreach includes a "publicizing / awareness" element and goes beyond general service.)

- **Collaboration** – work with other departments in your university or with other HF/E programs in nearby universities (e.g., local student conference).

- **Service to HFES** – participate on the Annual Meeting Host Committee or organizing activities as part of Student Career and Professional Development

Day. (Individual student volunteer positions are not part of this category, nor is simple attendance.)

- **Exploration** – design or conduct research on projects taken on by the chapter; work together to solve some problem.

- **Social** – hold chapter social activities to foster interaction among the members.

- **Information dissemination** – use a Web site, mail group, wiki, etc., to share information, promote a program, and so on. (This should be above and beyond that which would be expected for just running the chapter.)

- **Mentorship** – mentor incoming and new students; participate in student orientation for incoming students. (Formal activities / process for mentoring)

- **Continuous improvement** – improve the resources of the chapter (library, facilities, etc.)

- **Creativity** – utilize creative approaches to chapter activities.

Note: an activity/ event may be able to count as activity for more than one category where appropriate. However, consideration of excellence for any specific activity/event may be limited to one category.

2018 APPLICATION FOR STUDENT CHAPTER RECOGNITION

Student Chapter Name	
Recognition Level Sought	
Chapter President	
E-mail Address	
Faculty Advisor	
E-mail Address	
Chapter Mailing Address	
Telephone number	

Please provide an outline (or table of contents) for your application materials

APPENDIX E

STUDENT MEMBER WITH HONORS

This designation honors students who have made an outstanding contribution to the discipline and HFES during their tenure as a student. To qualify, students must meet *all* of the following eligibility requirements:

- Student membership in HFES for at least six months prior to application for honors designation (as evidenced by your HFES ID#).
- Graduate student, or class standing of junior or senior for an undergraduate.
- Minimum GPA of 3.75 (out of 4.0) or its equivalent for graduate students as evidenced by a transcript, (international students with alternate grading scales or courses should provide documentation/justification of equivalence to a GPA of 3.75).
- Minimum GPA of 3.50 (out of 4.0) or its equivalent for undergraduate students as evidenced by a transcript, (international students with alternate grading scales or courses should provide documentation/justification of equivalence to a GPA of 3.75).
- Successful completion of at least three human factors and ergonomics-related courses with a grade of A or its equivalent (as evidenced by a transcript or letter from the instructor).
- Significant HF/E related service to HFES at the society-wide or local-chapter level, or to the local community (provide letter from chapter adviser, committee chair, or officer of the group).
- One letter of recommendation from a faculty member, which specifies and demonstrates the outstanding contributions made by the student. This letter of endorsement from the faculty member is critical to the application. The letter should highlight the outstanding contributions of the student and indicate how those achievements meet the requirements for the student to be recognized as a *Student Member with Honors* in the society by distinguishing the student from their peers.

In addition, at least <u>two</u> of the following three conditions must be met:

Publication of a journal article. The article must appear in an HFES approved refereed journal (e.g., *Human Factors, Ergonomics, Applied Ergonomics*, *Journal of Cognitive Engineering and Decision Making*, or peer-reviewed journals approved by the Awards Committee listed below:

- Accident Analysis & Prevention
- Applied Ergonomics
- Ergonomics
- Human Factors
- Human Factors and Ergonomics in Manufacturing & Service Industries
- International Journal of Human-Computer Interaction
- International Journal of Industrial Ergonomics
- International Journal of Occupational Safety and Ergonomics
- Journal of Safety Research
- Occupational Ergonomics
- Safety Science

- Theoretical Issues in Ergonomics Science
- WORK: A Journal of Prevention, Assessment & Rehabilitation

All IEA (www.iea.cc) endorsed, peer-reviewed journals are approved for this criterion (Note: the approval is for journal articles appearing in these outlets. Book reviews, proceedings papers, or conference abstracts published in the journals do not count toward this requirement). Approval for an article published in a journal not included on this list should be obtained in writing from the Student Affairs Chair by the candidate prior to submitting the application). The student must be listed as the first or second author, with their role in the publication documented for second authorship. Articles "submitted" or "under review" are not sufficient for meeting this criterion.

- A human factors and ergonomics -related lecture presentation at a national or international meeting (provide the reference and photocopy from program or letter from adviser).
- Evidence of *significant* contribution to an industry project (e.g., design award, patent, transformational product or system design, ergonomics program development). Note: The student must be a primary contributor to the project, and activities must significantly exceed those required of most "capstone" courses. A letter from the project sponsor detailing the student's role and the significance of the project is required for this criterion

It should be noted that meeting at least two of the three conditions above is necessary but not sufficient for the award. The quality of the candidate's contributions in each of the areas will also be evaluated.

Submitting Your Application

The deadline for applications for the Student Member with Honors is ***July 2, 2018***. No application will be accepted after this date.

The first page of your application should include the following information: full name, institution, address, telephone number, e-mail address, and an outline of your application package. Also be sure to include the names of the courses that qualify as HF/E related, and the name and e-mail address of the faculty member writing your recommendation (so these can be easily matched).

Completed applications (minus the letter of recommendation) should be compiled and saved as one document (preferably PDF, but Word is acceptable). This application should be sent as an e-mail attachment to the Student Affairs Chair and Co-Chair, Drs. Linsey Steege, lsteege@wisc.edu and Farzan Sasangohar, sasangohar@tamu.edu.

The letter of recommendation should be e-mailed to the Student Affairs Chair directly from the faculty member writing the letter.

Application Checklist

- ☐ Application cover page with information listed above (see template on next page of this document)
- ☐ Transcript (unofficial is acceptable)
- ☐ HFES member ID# and date joined
- ☐ Description of service to HFES, chapter or community
    - Letter in support of service

- ☐ Reference of publication (if applicable)
- ☐ Presentation title, conference name, location, and date (if applicable)
    - Copy of relevant page of conference program or letter from conference or adviser
- ☐ Description and images to support significant industry contribution (if applicable)
- ☐ Letter of recommendation – electronic copy sent directly from faculty member to the Student Affairs Chair (e-mail: Kim.Vu@csulb.edu).

2017 APPLICATION FOR STUDENT MEMBER WITH HONORS

Name: HFES Member ID#:

Institution: HFES member since (mm/yyyy):

Address:

Telephone number:

E-mail Address:

Faculty member making recommendation:

E-mail Address:

Please provide a brief summary or outline of your qualifications and application materials

APPENDIX F

HFES POLICIES AND GUIDELINES FOR STUDENT CHAPTER WEBSITES

Policies

The following items must appear on all HFES Technical Groups and local and student chapters:

1. HFES logo, which you can obtain (tiff format, black and white only) from HFES

Or

Note: If you would like to modify the logo or incorporate it into your own logo or other graphic element, please send the Communications Department a copy before you post your graphic on your site.

2. The group's name must include "HFES" or "Human Factors and Ergonomics Society," such as "Aerospace Systems Technical Group of the Human Factors and Ergonomics Society", "Arizona Chapter of he Human Factors and Ergonomics Society", or "HFES Old Dominion University Student Chapter"

3. A link to the HFES Web site (http://hfes.org) must appear on the home page.

Guidelines

1. If your Web site is not hosted by HFES, send the Communications Department the URL for your site. The HFES Web site contains links to all active TG and chapter Web sites.

2. Be sure to notify the central office whenever your Web site URL changes.

3. Test all the links throughout your site regularly to ensure they are still active; update as needed.

APPENDIX G

HFES TECHNICAL GROUPS

Aerospace Systems
Is concerned with the application of human factors to the development, design, certification, operation, and maintenance of human-machine systems in aviation and space environments. The group addresses issues for civilian and military systems in the realms of performance and safety.

Aging
Is concerned with human factors appropriate to meeting the emerging needs of older people and special populations in a wide variety of life settings.

Augmented Cognition
Is concerned with fostering the development and application of real-time physiological and neurophysiological sensing technologies that can ascertain a human's cognitive state while interacting with computing-based systems; data classification and integration architectures that enable closed-loop system applications; mitigation (adaptive) strategies that enable efficient and effective system adaptation based on a user's dynamically changing cognitive state; individually tailored training systems; and roadmaps for future directions concerning augmented cognition science and technology and guidelines of use for the technology and the user information that may be garnered from it.

Children's Issues
Consists of researchers, practitioners, manufacturers, policy makers, caregivers, and students interested in research, design, and application concerning human factors and ergonomics (HF/E) issues related to children's emerging development from birth to 18. The topic of children inevitably includes caregivers and educators, which too is a main focus, particularly with respect to their perceptions and physical and cognitive tasks. Example application areas include injury prevention, product usability, physical and cognitive maturation, workload and decision-making in varied settings and environments such as home, school, vehicle, recreation, and digital spaces. The scope not only includes products intended for children, but also other products in the environment that present hazards to children.

Cognitive Engineering and Decision Making
Encourages research on human cognition and decision-making and the application of this knowledge to the design of systems and training programs. Emphasis is on consideration of descriptive models, processes, and characteristics of human decision making, alone or in conjunction with other individuals or intelligent systems; factors that affect decision making and cognition in naturalistic task settings; technologies for assisting, modifying, or supplementing human decision making; and training strategies for assisting or influencing decision making.

Communications
Is concerned with all aspects of human-to-human communication, with special emphasis on communication mediated by technology. In addition to work in telephone services, there is an increasing emphasis on multimedia communications, such as Internet services, Internet telephony, interactive TV, desktop videoconferencing, collaborative communications, and multimedia information services.

Computer Systems
Is concerned with human factors in the design of computer systems. This includes the user-centered design of hardware, software, applications, documentation, work activities, and the work environment. The CSTG is the organizational meeting place for many human factors practitioners and researchers interested in computer systems: hardware and software, cognition and anthropometry, graphical and character based UIs, the Internet and intranets, and local and distributed applications.

Education
Is concerned with the design of educational systems, environments, interfaces, and technologies and with human factors education. The group consists of educators, researchers, students, and others interested in educational human factors and ergonomics, directed at improving educational design and in addressing the educational needs of those seeking to increase their knowledge and skills in the human factors and ergonomics field.

Environmental Design
Is concerned with the relationship between human behavior and the designed environment. Common areas of research and interest include ergonomic and macroergonomic aspects of design within home, office, and industrial settings.

Forensics Professional
Is concerned with the application of human factors knowledge and techniques to "standards of care" and accountability established within the legislative, regulatory, and judicial systems. The emphasis is on providing a scientific basis to human factors/ergonomics issues raised within these systems.

Individual Differences in Performance
Serves those who share an interest in any of the wide range of personality and individual difference variables that are believed to mediate performance.

Health Care
The Health Care Technical Group is interested in maximizing the contributions of human factors and ergonomics to medical systems effectiveness and the quality of life for people who are functionally impaired.

Human Performance Modeling
The Human Performance Modeling Technical Group focuses on the development and application of predictive, reliable, and executable quantitative models of human performance. It considers the human, engaged in some goal-directed behavior, in the context of a specific task environment

Internet
Is concerned with user interface design of Web content, Web-based applications, Web browsers, Webtops, Web-based user assistance, and Internet devices; behavioral and sociological phenomena associated with distributed network communication; human reliability in administration and maintenance of data networks; and accessibility of Web-based products.

Macroergonomics
Formerly the Organizational Design and Management Technical Group, focuses on organizational design and management issues in human factors and ergonomics as well as work system design and human-organization interface technology.

Occupational Ergonomics
Is concerned with the application of ergonomics data and principles for improving safety, productivity, and quality of work in industry. It concentrates on service and manufacturing processes, operations, and environments, including the design of products that form the basis of industrial employment.

Perception and Performance
Consists of individuals interested in the relationship between perception and human performance. Areas of concern include the nature, content, and quantification of visual information and the context in which it is displayed; the physics and psychophysics of information display; perceptual and cognitive representation and interpretation of displayed information; assessment of workload using visual tasks; and actions and behaviors that are consequences of visually displayed information.

Product Design
Is dedicated to developing consumer products that are useful, usable, safe, and desirable. By applying the principles and methods of human factors, consumer research, and industrial design, the group works to ensure the success of products sold in the marketplace.

Safety
Is concerned with the development and application of human factors technology as it relates to safety in all settings and attendant populations as it relates to safety in all settings and attendant populations. These include, but are not limited to, aviation, transportation, industry, military, office, public building, recreation, and home environments.

Surface Transportation
Provides a forum for individuals involved or interested in human factors to exchange information, methodologies, and ideas that are being developed and/or applied in the international surface transportation field. In essence, *surface transportation* refers to all forms of transit outside the aerospace sector.

System Development
Offers a forum for fostering research and exchanging information with respect to the integration of human factors and ergonomics into the development of systems. Specific items of interest include the system development process itself; developing tools and methods, notably modeling and simulation; case studies; and such critical issues as reduced staffing for complex systems, the impact of increasing computerization, and stress and workload effects on performance.

Test and Evaluation
Consists of people interested in all aspects of human factors and ergonomics as applied to the evaluation of systems. Evaluation is a core skill for all human factors professionals and includes measuring performance, workload, situational awareness, safety, and acceptance of personnel engaged in operating and maintaining systems.

Training
Consists of people interested in all aspects of human factors as applied to training systems. This includes training system design and evaluation, innovative technologies for training, and instructional design and implementation applied to training systems. The single largest sponsor of human factors training research, development, and acquisition is the Department of Defense.

Virtual Environments
Is concerned with human factors issues associated with human-virtual environment interaction. These issues include maximizing human performance efficiency in virtual environments, ensuring health and safety, and circumventing potential social problems through proactive assessment. For VE/VR systems to be effective and well received by their users, researchers need to focus significant efforts on addressing human factors issues.