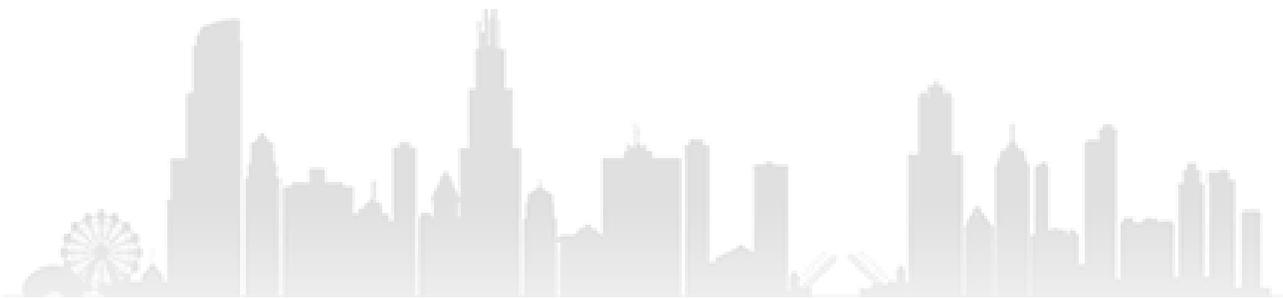


The Chicago Section of the Institute of Food Technologists **Leadership Team Handbook**

2020-2021



Chicago Section
Institute of Food Technologists



Officers and Executive Committee

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Introduction

The Chicago Section of the Institute of Food Technologists (CSIFT) was the first Section of IFT, is the largest, and most active Section of the Institute of Food Technologists (IFT). The Section boundaries encompass the northern part of the State of Illinois and include the Illinois postal zip codes 600-619, 623, 625-627, 463, and 464. However, the Chicago Section IFT accepts local membership from any interested person from any other location who pays a full Member's annual dues.

The Section was officially formed on January 15, 1941, 2 years after the Institute of Food Technologists was founded. The International IFT organization is headquartered in Chicago, Illinois.

The Section is widely known for its active and dedicated leadership. The Chicago Section often hosts the IFT Annual Meeting and Food Expo when it is in Chicago.

The Section also initiated the annual Tanner Lecture Series and Suppliers' Night Expo. The Section awards several scholarships annually.

We are proud of our accomplishments and are eagerly looking forward to the future of our Section and our role in its success.

In an effort to record and document the activities of the Section, this handbook has been prepared to outline Section leader responsibilities and Section activities.

This document will be updated from time to time, and the new issuance date will be recorded on the cover. It will be produced in an adobe .pdf format, published on the Section website, and maintained in digital format by the Section's Business Office.

Section Mission

To serve the Chicago Section IFT by providing educational opportunities for members and future members by:

- increasing awareness of the vital role of food science and technology in everyday life;
- encouraging and providing the means for discussing and disseminating technical and other information relating to the production, processing, packaging, distribution, preparation, evaluation, and utilization of food;
- advancing the profession of food science and technology by promoting the maintenance of high professional standards among its members;
- supporting causes to advance the profession;
- providing a forum for the exchange of ideas, knowledge and information; and
- encouraging social interaction and professional development.

Officers and Executive Committee

Section Officers & Executive Committee

The Chicago Section of IFT has a leadership team that consists of the Section's Officers and the Executive Committee

No individual may hold more than one elected position at a time and all Officers and Executive Committee members must be current IFT members in good standing during her/his entire term of office. Each of the Officers serves a one-year term with the exception of the Treasurer who serves a three-year term.

Section Officers are elected annually by the membership in February-March and serve from September 1st of the current year through August 31st of the following year. Officers and members of the Executive Committee may be removed for cause or they can resign. The Section By-laws and Conflict of Interest / Code of Conduct Policy provide more information concerning this process.

The current Officers, Executive Committee Members, and Committee Chairs for the Chicago Section are listed on the Section website. The duties of each of the Section Officers and the Executive Committee elected members are identified in the By-Laws of the Section and are summarized with additional detail on the following pages of this document.

Chair of the Section

Term of Office: One year commencing on September 1st (second year of three-year commitment).

Duties:

- ⊕ Manage the affairs of the Section.
- ⊕ Act as Chair and voting member of the Executive Committee.
- ⊕ Serve on the Chicagoland Food Science Foundation Board.
- ⊕ Serve as member of the Finance Committee
- ⊕ Preside at all meetings and ceremonies of the members.
- ⊕ Review & approve meeting minutes and forward to Business Office for inclusion in that month's newsletter.
- ⊕ Write a monthly article for the newsletter.
- ⊕ Appoint Committees, including Committee Chairs, no later than September 1st.
- ⊕ Interface with National IFT staff.
- ⊕ Invite national dignitaries.
- ⊕ Draft and send letters of response from the Section on various issues.
- ⊕ Communicate with all Committee Chairs to ensure completion of events
- ⊕ Work with the Business Office, Committee Chairs, Treasurer and Finance Committee to set the budget.
- ⊕ Communicate with the Finance Committee to understand investment strategy as well as funds available.
- ⊕ Oversee the Nicholas Appert Award with IFT.
- ⊕ Set up regularly scheduled meetings with the Business Office to plan Section meetings, monthly agendas, and manage any issues.

Officers and Executive Committee

- ⊕ Meet with Committee Chairs regularly throughout the year.
- ⊕ Assemble monthly Executive Committee Meeting Agenda and Packet. Support provided by the Business Office.
- ⊕ Perform annual review of Management Company and present to Executive Committee. Review due in April with report due in May.
- ⊕ Coordinate the signing of the Conflict of Interest / Code of Conduct Policy with all new / incoming Committee Chairs, Executive Committee members, and Officers.

Chair-Elect of the Section

Term of Office: One year commencing on September 1st (first year of three-year commitment). Official term starts in September but work begins as soon as elected.

Duties:

- ⊕ Serve as a voting member of the Executive Committee.
- ⊕ Serve as appointed Chair of the Program Committee to plan and execute the Section Monthly Meeting speaker programs, including the gathering of speaker bio and topic information and its submission to the Newsletter Chair for publication. *See Program Committee section of the Handbook for further guidance and requirements including budgetary considerations, Leadership Training event, and Business Office support.*
- ⊕ Preside at Section meetings in absence of the Chair and Past Chair
- ⊕ Assist the Chair as required on special projects.
- ⊕ Work with the House Chair to select monthly meeting locations.
- ⊕ Select meeting dates for the following year and submit to Newsletter Chair for publication in the Section Newsletter.
- ⊕ Responsible for arranging hotels, flights, and transportation for event speakers. Recommend speakers book their own travel arrangements and the section will reimburse them.
- ⊕ Because the program for the year needs to be finalized before September, the Chair Elect / Program Chair will need to begin the work as Program Chair in March/April (or as soon as elected!).
- ⊕ Plan Tanner Lecture (see Tanner Lecture committee for details). Chair and Past Chair will assist in helping find a speaker of high caliber.
- ⊕ Work with the Section Chair on all matters concerning the management of the Section.

Past Chair of the Section

Term of Office: One year commencing September 1st (third year of three-year commitment).

Duties:

- ⊕ Serve as a voting member of the Executive Committee.
- ⊕ Serve on the Chicagoland Food Science Foundation Board.
- ⊕ Serve as appointed Chair of Awards Committee and Nominations Committee. *See Awards and Nominations Committee section of the Handbook for more information for further guidance for budgetary considerations and Business Office support.*

Officers and Executive Committee

- ⊕ Serve as member of Finance Committee
- ⊕ Draft and send letters of commendation to 50-yr. members of the Section and as an invite to the Tanner Lecture.
- ⊕ Preside at Section meetings in absence of the Chair.
- ⊕ Submit ballot for annual elections by January to National IFT.
- ⊕ In August of each year request that the Business Office orders a gavel for the incoming Chair.

Secretary of the Section

Term of Office: One year commencing on September 1st. Limit of 3 consecutive years.

Duties:

- ⊕ Serve as a voting member of the Executive Committee.
- ⊕ Record minutes of all meetings. Work with the Business Office to include in the agenda for the next month's meeting for approval at the Executive Committee meeting.
- ⊕ Preside at Section meetings in absence of Chair, Past Chair, Chair Elect, and Treasurer.

Treasurer of the Section

Term of Office: One year commencing on September 1st customarily filled for three (3) years).

Duties:

- ⊕ Serve as a voting member of the Executive Committee.
- ⊕ Serve as member of Finance Committee
- ⊕ Serve as an active member of the management contract renewal committee; provide financial implications to budget, assets, and cash flow.
- ⊕ Prepare / Work with Finance Chair to prepare annual budget and its implications to assets and investments for approval by the Executive Committee. Final budget due at the June Executive Committee meeting.
- ⊕ Provide Board with financial implications of assets and cash flow when the Board is discussing the addition of a non-budgeted expense.
- ⊕ Supervise Business Office to receive Section funds and deposit them in the name of the Section.
- ⊕ Supervise Business Office to make an account of all disbursements of the Section.
- ⊕ Coordinate the transfer of signature cards annually.
- ⊕ Supervise Business Office to issue all checks.
- ⊕ Work with Business Office for preparation of financial reports including Balance Sheet, Income Statement, and Budget Report (or Profit & Loss Statement) at minimum on a quarterly basis.
- ⊕ Work with Finance Committee on management of Investment Accounts designated for

Officers and Executive Committee

Scholarships. Report balances and performance of Investment Accounts to the Executive Committee on a quarterly basis at minimum. Act as primary authorized representative of the Section in making investment transactions (i.e. bond purchases and sales).

- ⊕ Submit a copy of the annual Section budget to National IFT as requested.
- ⊕ Submit monthly and audited final financial reports to the Executive Committee and to National IFT by the required dates.
- ⊕ Preside at Section meetings in absence of Chair, Past Chair and Chair Elect.
- ⊕ Supervise the Tax & Accounting Company that prepares the Section Income Tax Returns on annual basis alongside the Audit Committee.
- ⊕ Review the annual Audit with the Audit Committee

Executive Committee

The Executive Committee meets from September through June (except for November) of each year in a business meeting held prior to the monthly dinner meeting or as scheduled. Additional meetings may be scheduled with at least ten (10) days' notice before the meeting and may be in person or electronic meeting via conference telephone or other communications equipment.

Each member of the Executive Committee is requested to serve on one Section Committee during each year of his/her term, providing direction to committee leadership and participating in committee reporting during the Executive Committee meetings.

Each member is also required to attend the expected minimum number of Executive Committee meetings as documented in the bylaws missing less than 3 consecutive meetings.

Section Business Office

The Section Executive Committee may employ a contracted Business Office. The duties of the Business Office will vary depending on contractual or volunteer agreements, but shall in general be as follows:

- ⊕ Attend all committee meetings as able. May assist with setting up meetings, taking minutes, and keeping historical records.
- ⊕ Work with the Treasurer to handle income, pay expenses, and maintain complete financial records.
- ⊕ Organize and administer the registration for the annual Suppliers' Symposium and Expo. Assist the Suppliers' Night Committee with activities as necessary to execute this event.
- ⊕ Prepare and execute mailings and communications as requested by members of the Section Executive Committee.
- ⊕ Work with the Website Committee to update and maintain the Section Website.
- ⊕ Work with the Newsletter Committee to prepare and distribute the Section Newsletter nine (9) times annually.

Officers and Executive Committee

- ⊕ Work with the Membership Committee to maintain an electronic listing of all Section Members, updating listing as members join and leave the Section.
- ⊕ Work with the Treasurer, Finance Committee, and relevant committee chairs to pay all bills, manage the operations fund accounts, and manage all income.
- ⊕ Handle all telephone, email inquiries, and the Post Office mailbox.
- ⊕ Work with the House Committee to handle monthly meeting reservations, prepare attendee name badges, and other needs.
- ⊕ Work with the Program Committee to prepare monthly meeting speaker badges, certificates, or award checks and plaques.
- ⊕ Work with committees on Section Awards and Tanner plaque/check/tent cards.

Chicago Section IFT's current Business Office is:

International Association Management, Inc. (IAMI)
207 W. Ash Street, Lombard, IL 60148

Chicago Section IFT Telephone #: (630) 916-4960

Chicago Section IFT Mailing Address: P.O. Box 926, Lombard, IL 60148

Role of Committees / Sub-Committees

Membership Responsibilities

The Section includes a Membership Committee to conduct ongoing activities to retain current members and to recruit new members.

However, the responsibility for attracting new members and retaining current members is a responsibility for all Section Officers, Section Members, and Committee Chairs.

We all should be actively involved with representing the positive features of being a member of the Chicago Section IFT and promoting the benefits of membership to this organization to others and to encourage their participation in Chicago Section IFT.

The annual goals identified by our Membership Committee include five main areas of activity:

1. Recruiting new members.
2. Retaining current members.
3. Improving accuracy of our Mailing Lists (and use these for mailings).
4. Recruiting Student Members to IFT.
5. Keeping track of current membership.

Membership in CSIFT is limited to individuals in good standing of the IFT who are in compliance with the IFT's rules and regulations and who have paid membership dues to the CSIFT. Revocation or suspension of membership by the IFT shall automatically constitute revocation or suspension of membership in the SECTION.

There are three (3) membership categories: Member, Professional Member, and Student Member. There is also one (1) honorary membership status.

- a) **Member** Any person who is active in the food industry and who evidences interest in supporting the objectives of the IFT shall be eligible to become a Member. IFT has added 3 levels of membership:
 1. **Premier Member:** The fullest membership with all of the benefits
 2. **Premier Early Career:** for those in their first 3 years in the workforce following the completion of an undergraduate or graduate degree.
 3. **Networking and Engagement:** Member benefits that focus on networking.
- b) **Student Member** Any graduate student or person matriculated in an educational institution as a full-time student pursuing a degree (Associate or higher) in the field of food science and technology or in one or more of the sciences or branches of engineering concerned with advancing food science and technology shall be eligible for membership as a Student Member. All Student Members shall be members of the IFT Student Association.
- c) **Emeritus Status** Any current IFT Member who has retired from professional life in a remunerative capacity and has been a member of the IFT for at least twenty (20) years shall be eligible for Emeritus status. Individuals with Emeritus status receive similar benefits as Premier members.

Members are eligible to vote in the annual elections.

Role of Committees / Sub-Committees

Role of Committees / Sub-Committees

A Committee can be one of the most productive tools with which the Section has to work. Committee members are faced with the challenge of getting involved in the work the Committee was formed to accomplish. Each member's contribution and participation on the Committee will determine the success or failure of the Committee.

Functions of a Committee

The primary function of a Committee is to contribute to the efficient operation of the Section. In most cases, Committees are concerned with communicating information and assisting Section leaders in the decision making process.

The findings of a Committee have a direct impact on the decisions made by officers and the Executive Committee of the Section. Committee work can directly influence the direction of the Section. In the cases of subcommittees, the Committee Chair shall be responsible for monitoring and reporting on the activities of the subcommittee.

Committee Chairs

Even with capable members, a Committee without strong leadership is at a disadvantage. Responsibilities of Committee Chairs are defined in relation to each specific Committee. The Chair's role will normally change as the work of the Committee changes.

There are general responsibilities that are common for all Committee Chairs, which include:

- ⊕ Developing the Committee organization and structure.
- ⊕ Scheduling meetings. The Section as a GoToMeeting subscription. All conference call committee meetings should use this subscription. Every meeting should invite the following people:
 - Committee members
 - Business Office
 - Section Chair, Chair-Elect, and Past Chair

If requested, the Business Office will support your meetings by taking minutes and setting up the meeting invites

- ⊕ Preparing and/or approving agendas. Presiding at meetings.
- ⊕ Making Committee and individual assignments.
- ⊕ Reviewing and approving meeting minutes.
- ⊕ Overseeing the activities of the Committee.
- ⊕ Preparing the Committee's **budget**. Chairs of each Committee shall have budgeting responsibility and accountability for each event. Each chair should be responsible for:
 - Developing the event budget for the following year with adequate detail.
 - Calculating the net surplus or loss for the event.
 - Informing the incoming Chair of the budget and expectations for the event.
 - Presenting significant changes (like adjustment of fees) to the Executive Committee.
 - Providing a financial summary of any event activity.
 - Non-budgeted items must be approved by the Board of Directors.

Role of Committees / Sub-Committees

- ⊕ Preparing **financial reports** at the conclusion of each event.
 - Maximum spending for meetings is no more than \$50 per person including tax and tip.
 - Use the **Expense Reimbursement** Form for all reimbursements. Upload receipts and form into Section FTP site. Include a listing of all attendees.
 - Login to the CSIFT FTP – If you have an account already you can use it, otherwise use the login below.
 - Login Site: <http://chicagoift.org/FTP/>
 - Username: ExpenseReimbursement and
 - Password: ExpenseReimbursement
 - In the left column click on CSIFT Leadership Forms under Workspaces. Right click the Expense Payment Request Form and then click Download. Save and fill out the form.
 - If you are still in the FTP site in the left column at the top click the dropdown arrow and then click CSIFT Expense Reimbursement. Otherwise, login to the FTP site and then in the left column click CSIFT Expense Reimbursement under workspaces.
 - At the top right click Upload then click “Select files on your computer” and then browse to the form you filled out in step 4. After it has been uploaded you are now done submitting your Expense Reimbursement.
- ⊕ **Events:** Providing information for use on the Section website before and after an event.
Providing information for use in the Section Newsletter before and after an event.
- ⊕ Bring in new members to Committee to get more individuals involved.
- ⊕ Coordinate with the Business Office to support the needs of the Committee.

The success achieved as a Committee Chair will depend largely upon that person’s ability to preside over meetings and guide the Committee toward its defined goal. When the Section’s Chair is selecting Committee Chairs, he/she should clearly discuss expectations for the Committee, the time commitment necessary to achieve success and execute the specific duties required during the year.

To assist with achieving success the Committee Chair should:

- ⊕ Establish goals and schedules and monitor these throughout the year
- ⊕ Always begin meetings on time.
- ⊕ Conduct meetings from an agenda.
- ⊕ Briefly and clearly state the reason for the meeting at the beginning.
- ⊕ Review the Committee’s objectives relative to the Section’s objectives.
- ⊕ Assure that adequate minutes are maintained and distributed.
- ⊕ Report the activities of the Committee to the Executive Committee.
- ⊕ Attend Executive Committee meetings.
- ⊕ Invite a representative of the Business Office to attend meetings. The Business Office can assist with meeting scheduling, the taking of minutes, and keeping a historical record of the work done by each committee annually.

Role of Committees / Sub-Committees

The composition of each Committee is specific to the needs of the Committee. It is likely that the incoming Section Chair will work with the selected Committee Chair to appoint Section Committees.

As the role of the Section Chair is to appoint committee chairs, it is up to the discretion of each incoming Section Chair to make changes to committees and committee leadership. It is desirable to have Committee Chairs appointed in time to start functioning on September 1st.

Unless otherwise noted in the Section By-Laws or Committee organization, Committee Chairs and members are appointed for a term of one year. Committee Chair appointments are made by the incoming Chair generally in May to August for the following fiscal year.

Each committee chair has a maximum of a three-year term. It is recommended that in year 2 of your term that each committee chair identifies a co-chair and uses year 3 to mentor the co-chair as a potential future chair of the committee. It is recommended that the outgoing chair of the committee continues to serve as a committee member of the committee to ensure continuity in the committee and to support the incoming committee chair.

When selecting members, it is important to find individuals that are willing to serve and clearly understand what is expected of them. Filling Committees with individuals who do not clearly understand their role or the expectations of their role and commitment they are making will only result in a lack of success of the Committee.

To provide for continuity and for the development of future leaders, it is important that Committees are made up of a balance of successful, experienced members with members that are new to the Section. New members provide a fresh outside perspective, while experienced members provide guidance and history.

It is always to the Committee's benefit to appoint members who are knowledgeable and interested in the Committee's area of activity. The Chair should provide the Committee with background and leadership to help the Committee function successfully.

Section Standing Committees

- Finance Committee
- Nominating / Awards Committee

Section Committees

These Committees of the Chicago Section shall be appointed as needed:

- | | |
|---------------------------------|---|
| • Audit Committee | • Membership Committee |
| • Awards / Nominating | • New Professionals Committee |
| • Employment Committee | • Professional Development Committee |
| • Hospitality Committee | • Program Committee |
| • Host Section Committee | • Scholarship Committee |
| • House Committee | • Sergeant-at-Arms (includes By-Laws) |
| • Long-Range Planning Committee | • Suppliers' Night Committee |
| • Marketing Committee | • Tanner Lecture Committee
(subcommittee of Program) |

Role of Committees / Sub-Committees

Description of Committees/Subcommittees

Following the Work Plan and Annual Report is a summary of each of the Committees of the Chicago Section IFT. A specific summary page is provided for each of the Section's Committees / Subcommittees.

The incoming Committee Chairs should develop a Work Plan for the activities of their committee. Work Plans should be based on achieving the goals of the Section and are due by August 30.

The final duty of each Committee Chair is to submit a written report summarizing the activities of the Committee for the year to be included in the June meeting agenda. Information is provided below.

Committee Work Plan

The purpose of this form is to guide the goal setting exercises of each Committee of the Chicago Section IFT. Each Committee Chair is asked to lead their Committee in a planning exercise to determine their goals and timelines for accomplishing their plans through the year.

The work plan is to be completed and submitted to the Section Chair by **August 30th** for discussion at the September Executive Committee meeting.

The following information should be included in the report.

1. Committee Name
2. Committee Chair
3. List of Committee Members
4. Goals for the year
5. Committee Meeting schedule
6. Planned activities

Annual Committee Report

The purpose of this report is to provide a structure for the final report to be completed by each Committee of the Chicago Section IFT. This form is to be completed and submitted to the Section Chair no later than by **May 31** for inclusion in the Section Annual Report and presented at the June Executive Committee meeting. Committee Chairs may attach additional information that logs the activities and achievements of the Committee for the fiscal year.

The following information should be included in the report.

1. Committee Name
2. Committee Chair
3. List of Committee Members
4. Update on the goals for the year – measurement of those goals
5. Combined meeting minutes
6. Activities / events run – number of attendees and a description of each event.
7. Budget request for the next year.

Chicago Section IFT Volunteer Code of Conduct & Conflict of Interest Policy

Chicago Section IFT Mission Statement:

To serve the Chicago Section IFT by providing educational opportunities for members and future members by:

- Increasing awareness of the vital role of food science and technology in everyday life;
- Encouraging and providing the means for discussing and disseminating technical and other information relating to the production, processing, packaging, distribution, preparation, evaluation, and utilization of food;
- Advancing the profession of food science and technology by promoting the maintenance of high professional standards among its members; and
- Supporting causes to advance the profession; and providing a forum for the exchange of ideas, knowledge and information.

Volunteers will at all times abide by and conform to the following Code of Conduct in their capacity as a Chicago Section IFT Volunteer:

Terms / Definitions

- **CSIFT:** Chicago Section of the Institute of Food Technologists (IFT)
- **Volunteer:** An individual who freely offers to participate in the leadership activities of the Chicago Section of IFT
- **Section:** A Section of IFT. We are the Chicago Section of IFT
- **Leadership:** Those who participate in the Section as Officers, Executive Committee Members, Committee Chairs, Committee Members, and/or Task Force Members.

General Expectations

1. Volunteers will contribute to a collegial, inclusive, positive, and respectful work environment for fellow Volunteers, members, and CSIFT Business Office, and they will model the best in professional behavior.
2. Volunteers will know, understand, and support Chicago Section IFT's mission, core purpose, values, goals, strategies, and annual directives. They will also become familiar with and follow CSIFT's policies, procedures, and guidelines as documented in the Committee and Officer Handbook while acting on behalf of CSIFT.
3. Volunteers will not discriminate and will be respectful of the diversity of all members.
4. Volunteers will only use CSIFT's marks, insignia, name, logos, and trade dress (collectively, "CSIFT Marks") in compliance with guidelines issued by CSIFT from time to time.
5. Volunteers will obey all applicable laws and regulations of the relevant government authorities, including all laws and provisions that govern appropriate conduct in the work place while acting on behalf of CSIFT.

Conflict of Interest / Code of Conduct

6. Volunteers will make or recommend decisions in the best interests of CSIFT as a whole rather than focusing on any CSIFT subpart or advocating options that advance a personal concern.

Meetings and Communication

1. Volunteers will uphold strict confidentiality regarding any information discussed at closed Executive Committee meetings or in the course of any other deliberations and communications. No Volunteer will share, copy, reproduce, transmit, divulge or otherwise disclose any confidential information related to the affairs of the Section. Questions regarding the confidential nature of CSIFT information or documents will be directed to the appropriate CSIFT Business Office person or Board member.
2. Volunteers may not speak on behalf of CSIFT or the Board to external parties, such as the media or other interested parties unless specifically asked to do so by the Section Chair or as documented as part of the duties in the Officer & Committee Handbook.
3. All contractual agreements are the responsibility of the CSIFT Business Office in accordance with established authority and procedures. Volunteers cannot make contractual commitments on behalf of CSIFT with the exception of Board officers formally granted such authority by the Board's policies.
4. All CSIFT correspondence, regardless of the medium, is a reflection on the Section. E-mail communications will follow the same professional standards as verbal communication. E-mails may be considered legal documents and, therefore, caution must be exercised when recording written opinions and statements pertaining to the role of any CSIFT Volunteer(s). The use of the "blind copy" function is strongly discouraged when conducting official CSIFT business.
5. Volunteers will be supportive in communicating about CSIFT to other Volunteers, Members, and stakeholders. Inappropriate communication by email or in any public forum including social media about CSIFT, its Volunteers, CSIFT Business Office, stakeholders, policies, procedures or guidelines is not acceptable. Issues regarding CSIFT will be taken up in private with the appropriate CSIFT Board Member.
6. Participation in committee meetings (in-person and/or teleconferences as determined by each committee) is typically required to fulfill a Volunteer's duties. Volunteers will commit to meeting the requirements of the committee as outlined in the Officer and Committee Handbook.

Relationship with Other Volunteers, Members and CSIFT Business Office

1. Volunteers will understand the scope of their authority and exercise good judgment in their dealings with other Volunteers, members, CSIFT Business Office, and the general public. Accordingly, volunteers will respond to all members and stakeholders in a prompt, responsible, respectful and professional manner, and they will represent their role within CSIFT clearly and accurately.
2. Volunteers will not request special/personal favors or confidential/embargoed information from other Volunteers, members, or CSIFT Business Office without prior consultation and agreement of the Officers and/or Executive Committee.

Conflict of Interest / Code of Conduct

3. CSIFT events are professional gatherings and therefore appropriate behaviors are expected. Volunteers will adhere to CSIFT policies, procedures, guidelines, and the Volunteer Code of Conduct in all interactions with other Volunteers, members, stakeholders, CSIFT Business Office, vendors, and other constituents.
4. Volunteers do not have direct authority over CSIFT Business Office and do not have authority to delegate actions to CSIFT Business Office outside of their contracted responsibilities.

Avoiding Conflict of Interest

1. No Volunteer will use any information provided by the Section or acquired as a consequence of the Volunteer's service to the Section in any manner other than in furtherance of his or her volunteer duties. Furthermore, Volunteers will not misuse Section property or resources. They will at all times keep the Section's property secure and will not allow any person access to such property unless authorized by CSIFT.
2. Volunteers will not persuade or attempt to persuade any Member, exhibitor, sponsor, supplier, contractor, or any other person/entity with an actual or potential relationship with the Section to terminate, curtail or not enter into that relationship. Further, Volunteers will not take any action that would serve to reduce the monetary or other benefits to CSIFT of such relationship(s).
3. Volunteers are expected to act at all times in the best interest of the Section.
4. When encountering a potential conflict of interest, Volunteers will identify the conflict and report it to one or more members of the CSIFT Executive Committee. If an actual conflict of interest is determined to exist, the Volunteer may be asked to remove him- or herself from all discussions and voting on the matter.
5. Volunteers will not personally accept gifts, gratuities, free trips, honoraria, personal property, or any other item of value from any person or entity as a direct or indirect inducement to provide special treatment to such donor on matters pertaining to the Section.

Volunteer Commitments

1. Volunteers will carry out volunteer duties in accordance with CSIFT procedures as documented in the CSIFT Officer and Committee Handbook and adhere to project timelines to which they have agreed.
2. In the event that a Volunteer realizes that s/he cannot fulfill a commitment, s/he will notify the responsible CSIFT volunteer leader / committee chair proactively.
3. Volunteers will recognize and be respectful of the fact that CSIFT Business Office may have deadlines and CSIFT leadership may on occasion find it necessary to replace or augment volunteer resources.
4. Volunteers will relinquish project responsibilities promptly when requested if doing so is deemed to be in the best interests of the Section.

Conflict of Interest / Code of Conduct

Confidential Materials and Work in Progress

Upon completion of service, Volunteers will ensure that all committee related documents will be saved to the CSIFT FTP site. Such return will not abrogate him or her from the continuing obligations of confidentiality with respect to the information acquired as a consequence of his or her tenure as a Volunteer.

Violations of the Code of Conduct

1. CSIFT leadership will resolve any issues with Volunteers in a professional manner.
2. If issues or violations of the Code of Conduct are persistent or egregious, Volunteers may be required to leave their volunteer position(s) and may be precluded from serving in volunteer roles in the future. Except in cases pertaining to the Board of Directors, the Chair will determine if this action is necessary and will notify the Volunteer. In cases pertaining to the Officers / Board of Directors, the Executive Committee will determine if this action is necessary and will designate one of its Members to notify the Board Member.
 - a. A three-person committee of Executive Committee Members appointed by the Executive Committee will review the issue and allow the Committee Member or Officer to plea the case.
3. CSIFT reserves the right to pursue additional measures up to and including legal action in extreme cases where the actions of a Volunteer` may have compromised CSIFT's mission, reputation, business prospects or legal stature.

I have read the CSIFT Volunteer Code of Conduct in its entirety and agree to abide by its provisions at all times while I am volunteering for CSIFT.

Signature

Date

Printed Name

GoToMeeting & Zoom Committee Meeting Directions

Chicago Section IFT has two options for hosting committee meetings – GotoMeeting and Zoom. We strongly encourage all committees to schedule their meetings using one of these platforms.

CSIFT GoToMeeting Directions

If you are using GoToMeeting for the first time:

1. Go to <http://www.gotomeeting.com/online/>
2. Click on “Sign In” in the upper right hand corner
 - a. User: meetings@chicagoift.org
 - b. Password: Meetings@CSIFT1
3. Click on orange button that says “**Schedule a Meeting**” for a future meeting or “**Meet Now**” if the meeting is starting immediately.
4. A form will pop up.
5. Name your meeting to replace the text “New Meeting.”
6. Click on the date of the meeting.
7. Use the drop down to choose the time and the duration.
8. Click “Save”
9. New Screen – “Invite People.” You can copy the invite and send out to your individual email using the appointment feature in Outlook and adding the email addresses OR see below.
 - a. Invite the CSIFT Chair, Chair Elect, Past Chair, and Business Office to all meetings.
10. An appointment should show up in your Outlook / Appointment calendar.
 - a. If you use AOL or a similar email account, the appointment comes up blank. You will need to copy and paste the appointment information.
 - b. If you are sending an appointment to someone with an AOL account their appointment will be blank. You will need to send them the appointment information in the text of the email.
 - c. It is easier to view the appointment on phones if you put the phone number and access code into the location line of the appointment.

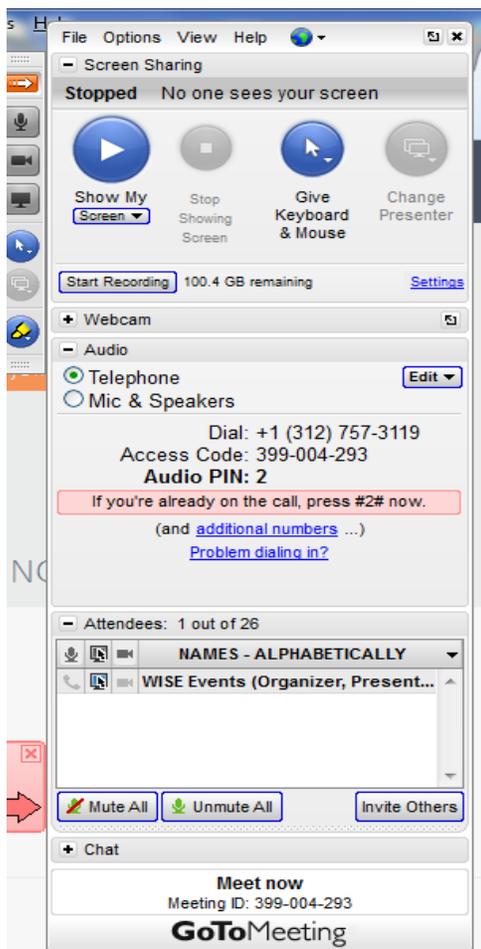
If you have set up a meeting before you should have the GoToMeeting ICON on your desktop.

1. Right click on the ICON and click “Open.”
2. If it asks for a login and password use the CSIFT user and password info.
3. Click on “My Meetings” and invite people. Click on the meeting you created and click on “Invite.”
4. An outlook invitation will pop up where you can add the email addresses of those you’d like to invite. You can also attach an agenda, etc.
5. An appointment should show up in your Outlook / Appointment calendar.

GoToMeeting & Zoom Committee Meeting Directions

Running / Managing Your Meeting

1. 15 minutes before your meeting should begin you should get an Outlook/email reminder to open your meeting. Click on the “**start meeting**” link. You can also click on the link in the appointment.
2. If you do not need the online meeting and just need the **conference call** you will still need to open the online meeting.
3. If you do not have access to your email appointments you can right click on the GoToMeeting ICON on your desktop or go to www.gotomeeting.com and login using the information on the previous page and click “Start” on your meeting listed under “My Meetings.”
4. Or if you do not have a scheduled meeting but want to start one immediately, login, click “Meet Now” and start the meeting. Then click on “Invite People” to send an invite.
5. A GoToMeeting Toolbar will pop up on the right side of your computer screen.



6. To open the **audio** part of the call dial the number on the screen (should be the same number as on the appointment), use the access code and the audio pin. The audio pin allows attendees to mute themselves while not speaking. It is a good idea to suggest muting to reduce background noise. You can also use skype to dial into the call or click on Mic & Speakers instead of Telephone.
7. Before clicking on “**Show My Screen**” make sure you have closed anything private that you do not wish shared. Once you click on “Show My Screen” anyone logged in can see your screen.
8. If you’d like to “**Pause**” the screen so you can move away from what is shared to pull up another document, click on the same button (Show my Screen) and it will freeze the screen. Click on it again to resume showing your screen.
9. **Attendees:** To identify who is attending the meeting click on the “Attendees +”
10. **Chat:** If you’d like to send a private message to someone during a meeting you can click on the chat + and choose who to send the note to from the list of attendees.
11. **Changing presenters:** You can change presenters any time during a meeting. Click on “Change Presenter” and then choose who to give the controls to from the attendee list. If you are given the controls you have to accept controls. The presenter can take over the controls at any time.

GoToMeeting & Zoom Committee Meeting Directions

12. **Give Keyboard and Mouse:** You can also give the keyboard and mouse controls to another attendee who can move the mouse on your computer. This isn't usually recommended as it is tricky. Easier to change presenter.

13. To view your entire screen so the toolbar doesn't cover up your screen click on the orange/white arrow.

14. To mute yourself, click on the **microphone**.

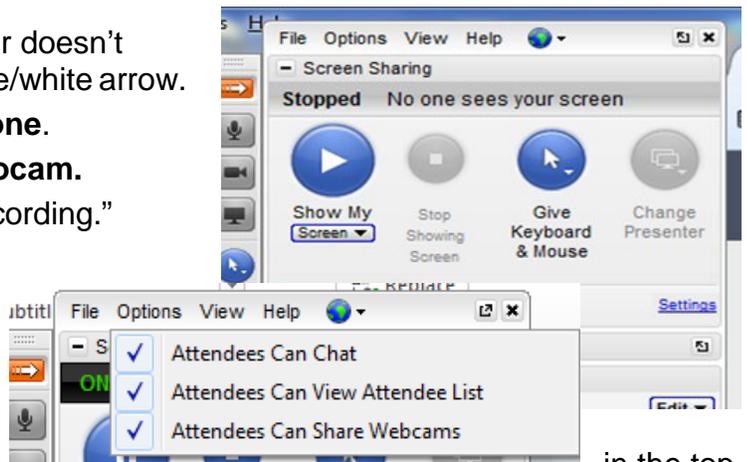
15. To let people see you, click on the **videocam**.

16. To **record** the meeting click on "start recording."

17. To adjust settings, click on "**Options**" to change the ability to chat, view attendee list, and share webcams.

18. To **end the meeting**, click on the "X" in the top right hand corner. If you'd like to end it for everyone, click that option. To let others continue, hand over the controls to someone else.

19. If you recorded the meeting, there are more complex directions to get the recording saved. Contact BusinessOffice@ChicagoIFT.org to get assistance.



GoToMeeting & Zoom Committee Meeting Directions

Zoom Meeting Directions

Website: <https://zoom.us/signin>

We have 9 licensed users in addition to the Business Office. For ease of use, we have created access for those committees that run events – see below. All others use the general login.

1. Chair: Courtney Gwinn - cgwinn@griffithfoods.com
2. Program Chair: James Nasella – James.Nasella@tateandlyle.com
3. Membership Co-chair: Upasana Hariram – Upasana.Hariram@mxns.com
4. Membership Co-chair: Nicole Chmielewski – Chmielnm@hotmail.com
5. New Professionals Co-Chair: Alifia Merchant – alifia.merchant@gmail.com
6. New Professionals Co-Chair: Gina Oberoi – gkoberoi@outlook.com
7. Professional Development Chair: Breanna McArthur – Breanna.mcarthur@treehousefoods.com
8. **General: Meetings@ChicagoIFT.org / PW: Meetings@CSIFT1 – for anyone not already listed.**

It is recommended that you watch the zoom video tutorials for detailed directions.

Essential aspects to review before running your first meeting:

1. Scheduling a meeting
2. Joining a meeting
3. Audio, video, and sharing

Scheduling a Meeting

You can schedule a single meeting or multiple meetings. Name your meeting as your committee name so that it is easy to find.

[My Meetings](#) > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When 

Duration hr min

Time Zone

GoToMeeting & Zoom Committee Meeting Directions

In this example, we chose to set the schedule for the entire year for our meeting. Unclick recurring meeting to schedule a single meeting.

Recurring meeting **Every month on the Third Thu, 9 occurrence(s)**

Recurrence

Repeat every month

Occurs on Day of the month

of the month

End date By After occurrences

Do not require registration or those without zoom accounts will not be able to attend. You can add a passcode for added security. You can also use the same meeting ID for all of your meetings.

Meeting ID Generate Automatically Personal Meeting ID 968 356 0759

Choose whether or not to allow video of the host and / or participants. Recommend choosing off as they can be turned on at any time during the meeting.

Choose both for audio so that the attendees can choose their audio.

Registration Required

Security Passcode Waiting Room

Video **Host** on off

Participant on off

Audio Telephone Computer Audio Both

Dial from United States of America [Edit](#)

GoToMeeting & Zoom Committee Meeting Directions

Meeting options: If you enable join before host, then participants can join even if you are delayed. This is important so that a meeting can still run even if the host cannot.

Only mute participants if it is an event with a speaker and you want to ensure there is no background noise.

Since we are not authenticating users, do not click that box.

If it is an event, click automatically record. If it is a meeting, then you can choose.

Add additional hosts if needed. Save meeting.

Meeting Options

- Enable join before host
- Mute participants upon entry 
- Only authenticated users can join
- Automatically record meeting

Alternative Hosts

Example: mary@company.com, peter@school.edu

[Save](#) [Cancel](#)

After you save the meeting you need to invite others to your meeting. You can add the meeting to your calendar using one of the links below.

[My Meetings](#) > [Manage "Test Meeting"](#) [Start this Meeting](#)

Topic: Test Meeting

Time: Aug 31, 2020 05:00 PM Central Time (US and Canada)

Add to: [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID: 968 356 0759

GoToMeeting & Zoom Committee Meeting Directions

Click on copy invitation on the right. Then open your calendar, add your committee members, and past the invitation. This invitation can also be used in social meeting marketing, etc.

Invite Link	https://zoom.us/j/9683560759	Copy Invitation
Video	Host	Off
	Participant	Off
Audio	Telephone and Computer Audio	
	Dial from United States of America	

Run / Start a Meeting

Choose your audio and share your screen. You can also invite others as needed.

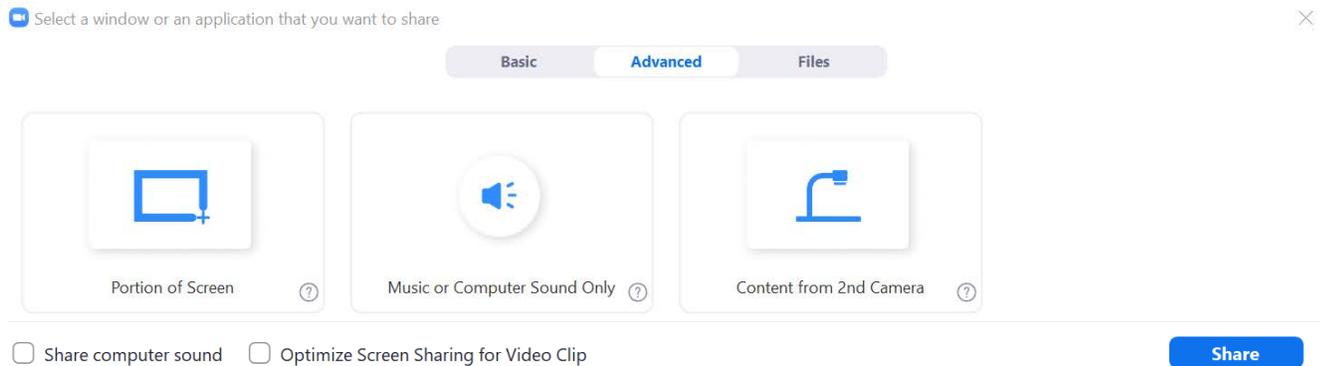
Put your cursor along the bottom of the screen and click on participants. This enables you to see the participants on the right side of the screen and manage audio and video.

To share your camera, click on share video. You can also record from here and manage chats.

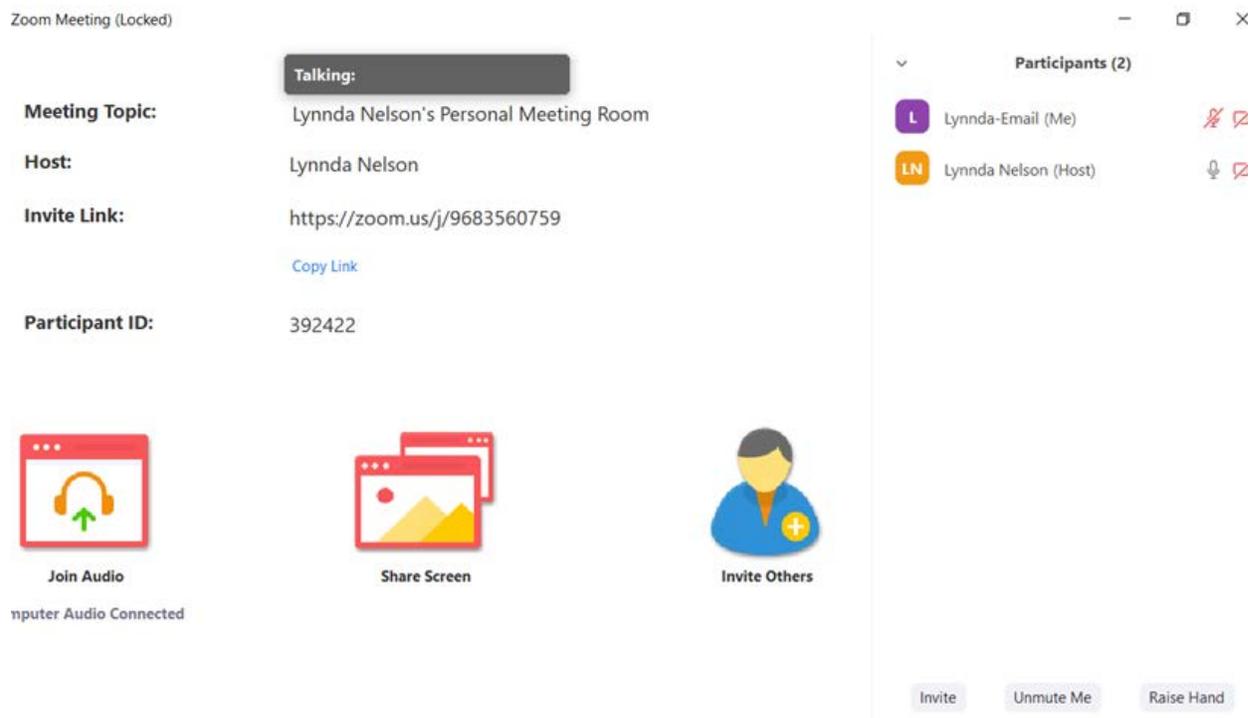
The screenshot displays the Zoom meeting interface. At the top left, it says "Zoom Meeting" with a status bar showing "Mute" and "Start Video" (disabled). The main area shows meeting details: "Meeting Topic: Lynnda Nelson's Personal Meeting Room", "Host: Lynnda Nelson", "Invite Link: https://zoom.us/j/9683560759" (with a "Copy Link" button), and "Participant ID: 273726". Below this are three large icons: "Join Audio" (with "Computer Audio Connected" text below it), "Share Screen", and "Invite Others". A "Talking:" bar is visible above the details. On the right, a "Participants (1)" list shows "Lynnda Nelson (Host, me)" with a microphone icon. At the bottom, a control bar includes "Mute", "Start Video", "Security", "Participants" (1), "Chat", "Share Screen", "Record", "End", "Invite", "Mute All", and a menu icon.

GoToMeeting & Zoom Committee Meeting Directions

To view advanced screen sharing options, click on share screen and advanced. You can choose which content to share and if you also want to share audio from a video.



The best way to prepare is to practice. Set up a meeting and make yourself the host and add a second email to also be an attendee from a second device. You can click on the participants to make another person the presenter / to share their screen.



Let attendees know that they can raise their hands to speak. This is really helpful in a larger meeting or during a presentation with a speaker. Participants who wish to ask a question for example, can raise a hand, the host can unmute them, and they can ask the question. Alternatively, you can ask them to use the chat button.

Chicago Section IFT Fiscal Policies and Procedures

Approved by the Executive Committee on 28 June 2019

General

The finance policy is developed by the Treasurer, Finance Committee, and Board Chair. Any suggested changes to the policy should be submitted to the Treasurer, Finance Committee, and Board Chair for review and approval by the Section Executive Committee.

The Finance Policy will be reviewed annually in January.

1. Accounting Procedures

- a. Chicago Section IFT uses the **accrual basis of accounting**. Throughout the fiscal year, expenses are accrued into the month in which they are incurred. The books are closed no later than 15 days after the close of the month.
 - 1) Invoices received after closing the books will be counted as a current-month expense.
 - 2) At the close of the fiscal year, this rule is not enforced. All expenses that should be accrued into the prior fiscal year are so accrued, in order to ensure that year-end financial statements reflect all expenses incurred during the fiscal year. Year-end books are closed no later than 90 days after the end of the fiscal year.
 - 3) Revenue is always recorded in the month in which it was earned.
 - 4) Pledges are recorded in the month received.
- b. **Journal entries** are posted in the accounting system by Business Office staff under the guidance of the auditing committee and/or the auditing company engaged to audit the Section's finances. This is to be completed on an annual basis in review of the annual financial reports and prior to the completion of the tax returns.
- c. **Bank reconciliations** completed on a monthly basis in preparation for each month's Executive Board meeting and as part of preparing the monthly financial report to the Treasurer and the Finance Chair. The accounting books are closed on the last day of each month.

2. Storage of Financial Records

CSIFT defines a financial record as any record that relates to the finances of the Section.

- a. All **accounting records** are stored in the QuickBooks Online Accounting System with real-time backups.
- b. All **financial records** are stored on the Business Office servers with twice daily back-ups to both an onsite hard drive and an offsite cloud system.
- c. All **hard copy financial records** are stored onsite at the Business Office premises for one fiscal year and then moved to the CSIFT storage locker.

3. Internal Controls

Internal controls are used to ensure that financial transactions are properly authorized, appropriated, executed and recorded.

- a. Any expenditure not included in the approved budget needs approval by the Executive Committee and the relevant Committee Chair.
- b. Any expenditure in excess of \$1,000 for the **purchase of a single item** needs approval by the Section Chair and the relevant Committee Chair.
- c. Any expenditure in excess of \$2,500 for the **purchase of a service** to the Section should have bids from three (3) suppliers if feasible. These bids will be gathered by the appropriate Committee Chair with support from the CSIFT Business Office. All bids should be voted on by the Executive Committee. This excludes expenditures for events such as dinner meetings and other Section events.
- d. The Executive Director is authorized to sign all contracts as approved by the appropriate committee chair.

4. Financial Planning & Reporting

a. Budgeting Process

The **annual budget** is prepared and approved annually for all committees. The budget is prepared by the Finance Committee. The budget is to be approved by the Executive Committee prior to the start of each fiscal year. The budget should be balanced before submitting for approval.

The Finance Committee will work together with all committees and the CSIFT Business Office to ensure that the annual budget is an accurate reflection of program and infrastructure goals for the coming year.

- 1) The Finance Committee prepares the annual budget for the following fiscal year no later than May 30 of each fiscal year and submits it to the Executive Committee for vote at the June meeting or prior to the end of the fiscal year August 30.
- 2) The CSIFT Business Office uses the Annual Budget template to track income and expense on a monthly basis or as part of its report for the Executive Committee Business Meeting. The report is provided to the Treasurer, Finance Committee Chair, and Section Chair and is included in the monthly agenda.

b. Internal Financial Reports

The CSIFT Business Office prepares regular **financial reports** on a monthly basis. All reports are finalized no later than 30 days after the close of the prior month.

- 1) The CSIFT Business Office prepares the following reports on a monthly basis:
 - Profit and Loss Report
 - Balance Sheet
- 2) The CSIFT Business Office, along with the Treasurer, prepares a **Summary of Investment Accounts** on a monthly basis as part of its monthly finance report.
- 3) The CSIFT Business Office provides reports to the Treasurer, Finance Committee Chair, and Foundation Chair a minimum of 3 business days prior to each Executive Committee Meeting.

c. **Audit Procedures**

- 1) An **internal audit** each year prior to the independent audit. An **independent audit** is conducted between December 1 and 20 annually by an outside auditing firm selected by the Executive Committee.
- 2) The CSIFT Business Office prepares all financial records to assist with the annual audit.
- 3) The audit chair, finance chair, treasurer, or other officer (a minimum of three) shall review and approve the financial statements, audited financial statement report, and the draft tax documents and then present them to the board for their review. The approval of said documents shall be documented in meeting minutes.

d. **Tax Compliance**

- 1) The outside auditing firm completes all required tax return documents following IRS filing requirements.
- 2) The CSIFT Business Office provides all necessary financial records to support the creation of the tax return documents.
- 3) The tax returns will be signed by the Executive Director as the primary signer with the Chair as the alternate. The principle officer will be the Executive Director with the address as the CSIFT Business office address.
- 4) Electronic copies of the tax return documents are stored as part of the CSIFT financial records system, and hard copies of the tax return documents are stored according to the procedures concerning the storage of financial records.

5. **Revenue & Accounts Receivable**

- a. **Invoices** are prepared by the CSIFT Business Office for all accounts receivable on an as-needed basis, but most often when customers wish to pay by check and request an invoice. **Outstanding invoices** are managed by the Business Office via emails and phone calls to the customer as needed. Payment terms are 60 days. Invoices more than 60 days overdue may result in the cancellation of a registration.
- b. **Revenue Recognition:** All contributions will be recorded in accordance with GAAP. Contributions are recorded as pledged or received and must be credited to the appropriate revenue lines as presented in the annual budget and coded as designated in the organization's Chart of Accounts.
- c. **Payments received via EFT** are deposited directly into the Section's Checking Account using the PayPal system that is part of the Section's online data management system. Each payment generates a receipt that is sent via email to the purchaser and the CSIFT Business Office.
- d. **Payments received via Check** arrive via the CSIFT's PO Box 926. The PO Box is checked a minimum of twice per week.
 - 1) Checks are entered into the CSIFT data management system and an electronic receipt is generated by the data management system that is sent to the purchaser and the CSIFT Business Office.

Finance Policy

- 2) The checks are then prepared for deposit – copied, stamped, and brought to the Section’s bank or deposited online.
 - 3) The copies of the checks and the electronic receipts are used to record the deposit into QuickBooks and then filed.
- e. **Payments received via Cash** are deposited within 5 working days into the Section’s Checking Account. Cash is counted by two people and signed for by both of them verifying the amount.

6. Expense & Accounts Payable

a. Invoice Processing & Approval

- 1) Invoices received by the CSIFT Business Office **for fees** such as telephone, public storage, and other monthly expenses are paid on the payment schedule via online payments when possible and via check otherwise.
- 2) Invoices received by the CSIFT Business Office **for event registrations** and expenses such as dinner meetings, golf outings, and suppliers’ night are reviewed by the appropriate Committee Chair for authorization of payment and paid within 30 days of invoicing by check, credit, or debit card.
- 3) All invoices are stored electronically in the IAMI hosted and onsite servers.
- 4) Payments are recorded in the QuickBooks accounting software that is accessible only via password.

- b. **Expense Reimbursements:** Reimbursement payments are made via check issued by the CSIFT Business Office for reimbursement of expenses incurred by Executive Committee Members, Committee Chairs and Committee Members upon receipt of a signed expense reimbursement form. The form is approved and signed by the Committee Chair and the Treasurer or Finance Chair and payment is recorded in QuickBooks.

- 1) CSIFT Business Office staff is reimbursed for travel expenses to and from CSIFT events. These expenses are recorded in the monthly IAMI expense report.
- 2) The maximum allowable expense for committee meeting expenses is \$50 per person.
- 3) Travel expenses related to external events or meetings are reimbursed after gaining pre-approval from the Executive Committee. External events or meetings are those organized by another organization or initiated by the CSIFT and held at a location outside the Chicagoland area. Some typical examples are: attendance of C-FAR meetings in Springfield, IL, travel to UIUC for scholarship-related meetings, or travel to other IFT sections for face-to-face meetings.

c. Payments made via check, credit card, debit card, or electronic banking

1) Checks

- i. Checks are issued as necessary / requested and are signed by those on the approved signatory list at the Section’s Bank. Signatories are updated annually during the month of August as responsibilities change at the conclusion of each fiscal year and before the beginning of the next fiscal year.
- ii. Checks more than \$1,000.00 require approval by the Treasurer or Finance Chair or Board Chair.
- iii. Blank checks are stored at the CSIFT Business Office.

- 2) **Credit and Debit Cards:** The CSIFT Business Office holds the only CSIFT credit and debit cards. Payments are approved by the Section Chair or the relevant Committee Chair. Payments are made via CSIFT Credit and Debit Cards for the following types of payment:
 - i. Regular monthly office expenses such as telephone and storage facility rent.
 - ii. Expenses for events, board of director meetings, and committee meetings scheduled by CSIFT Committee Chairs and Officers.

7. Asset Management

A business checking account for day-to-day operations is administered by the CSIFT Business Office under the oversight of the Treasurer and the Finance Chair. All investment accounts are administered by the Treasurer with oversight by Executive Committee.

- a. A transfer of funds from the business checking account to one or more investment accounts is executed by the CSIFT Business Office at the request of the Treasurer on behalf of the Executive Committee.
- b. Upon review of the financial report of the Suppliers' Expo event and in consideration of funding needs, the treasurer determines an appropriate amount not to exceed 25% of net income to be transferred to an investment account. Funds are transferred upon approval by the Executive Committee.
- c. When excess funds have accumulated in the business checking account and savings account due to positive income and are not needed for day-to-day operations, the Treasurer and the Executive Committee, determines the proper amount of funds to be transferred out of the business checking and savings account. The Treasurer determines to which investment account(s) these funds are transferred to ensure sufficient funds are available for scholarships.

Chicago Section IFT Financial Duties by Leadership Role

Supplement to Chicago Section IFT Finance Policy and Officer & Committee Handbook

11 September 2019

The Chicago Section IFT Officer & Committee Handbook provides information on the duties and responsibilities of the volunteer leadership team that manages the work of the Section. A summary of the duties and responsibilities of these members as they relate to financial matters is listed below.

Chair of the Section

- Work with the Business Office, Committee Chairs, Treasurer and Finance Committee to set the budget.
- Communicate with the Finance Committee to understand investment strategy as well as status of operating funds.
- Serve on the Finance Committee

Chair-Elect of the Section – no responsibilities

Past Chair of the Section

- Serve on the Finance Committee

Treasurer of the Section

- Serve as member of the Finance Committee
- Prepare / Work with Finance Chair to prepare annual budget for approval by the Executive Committee. Final budget due at the June Executive Committee meeting.
- Supervise Business Office to receive Section funds and deposit them in the name of the Section.
- Supervise Business Office to make an account of all disbursements of the Section.
- Coordinate the transfer of signature cards annually.
- Authorize Business Office Executive Director to issue and sign all checks whether physical or electronic after approval by Treasurer and/or Finance Chair and/or Committee Chair.
- Work with Business Office for preparation of financial reports including Balance Sheet, Income Statement, and Budget Report (or Profit & Loss Statement) at minimum on a quarterly basis.
- Work with Finance Committee on management of Investment Accounts designated for Scholarships. Report balances and performance of Investment Accounts to the Executive Committee on a quarterly basis at minimum. Act as primary authorized representative of the Section in making investment transactions (i.e. bond purchases and sales).
- Submit a copy of the annual Section budget to National IFT as requested.
- Submit monthly and audited final financial reports to the Executive Committee and to National IFT by the required dates.
- Supervise the Tax & Accounting Company that prepares the Section Income Tax Returns on annual basis. Sign Tax Return on behalf of the Section.
- Review the annual Audit with the Audit Committee

Finance Committee / Chair

The purpose of the Finance Committee is to serve as advisors to the Executive Committee and the Section on all Section financial matters, to assist the Treasurer and Section Chair in preparation of the Annual Budget, and to recommend to the Executive Committee when and how to invest all non-operating funds.

The Finance Committee will work together with all committees and the CSIFT Business Office to ensure that the annual budget is a balanced budget that accurately reflects the program and infrastructure goals for the coming year.

- Serve as advisor to the Treasurer and Business Office staff on maintenance and monthly reporting of all financial status reports.

- Work with Treasurer and Section Chair to develop an Annual Budget during June/July of each year.
- Work with Treasurer to assure proper distribution and investment of income and disbursement of funds dedicated to the Scholarship Funds.
- Work with Treasurer to review Section financial reports.
- Convene Finance Committee to decide recommended investments for surplus non-operating funds and provide recommendations to the Executive Committee for vote before investment.
- Develop, maintain, and revise Section Financial Policy

Executive Director

The Chicago Section IFT Business Office is managed by the Executive Director. The responsibilities of the Executive Director as regards to financial matters are listed below and included in their contract with Chicago Section IFT.

The Executive Director will ensure that the Section is fiscally responsible by

- a. Ensuring that the annual Suppliers' Expo event provides adequate income to pay Section expenses and contribute towards meeting revenue goals and staying within budget.
- b. Communicating monthly to Section leadership (Finance, Auditing, Treasurer, and Chairs) regarding financial matters.
- c. Managing bank accounts related to the operating funds.

The Executive Director will support the work of the Finance Committee by

- a) Paying all bills as invoiced before due date whether via debit card, credit card, or check (physical or electronic).
- b) Reimbursing all expenses within 30 days of receipt by check (physical or electronic).
- c) Making banking deposits within 5 days of receipt of checks/cash.
- d) Maintaining all Section financial records in the QuickBooks financial system monthly.
- e) Providing financial reports for each Executive Board meeting within 3 days of each meeting and in June for budgeting purposes.
- f) Providing all reports necessary for the annual audit and tax return preparation by December 20 of each year

The April 2019 Executive Board Meeting Minutes documents the decision made by the Board of Directors to move from banking at BMO Harris Bank to Wells Fargo Bank. All operating funds in those accounts will be moved by the Executive Director into checking and savings accounts. In addition, a credit card account will be opened.

The Executive Director is the primary signer on these accounts with the Treasurer, Chair, Chair-Elect, and Finance Chair as additional signers.

Resolution – September 11, 2019

The Executive Committee and Officers of the Chicago Section of the Institute of Food Technologists located at physical address 207 W. Ash St., Lombard, IL 60148 and mailing address PO Box 926, Lombard, IL, authorize Lynnda Nelson as its Executive Director to open checking, savings, and credit card accounts at Wells Fargo Bank moving all current operating funds.

In addition, Lynnda Nelson, as Executive Director is authorized to be the primary “signer” on all such accounts. The Treasurer, Chair, Chair-Elect, and Finance Chair will be additional signers and will be added after the accounts are opened.

This resolution was agreed upon by the Executive Committee Board (see September 11, 2019 Meeting Minutes)

End of Policy

Audit Committee

Audit Committee Procedures

The purpose of the Audit Committee is to review the financial records of the Section at least annually.

CSIFT policy states that an outside audit is conducted every year. The Audit Committee assists the Business Office with the preparation for the outside audit. This includes assisting with ensuring that the financial records are up to date, the investment income is recorded, and deferred revenue is marked as deferred.

The outside audit is usually scheduled for early December. All preparation for the audit should be completed no later than November 15 of that year. The Audit Committee reviews all documents submitted by the Business Office for the audit and reads all reports issued from the auditing company to confirm the accuracy of all statements made by the auditing company.

The Audit Committee is included in all emails between the Business Office and the Treasurer and the Finance Committee for reporting of the monthly financial statements and budget reports. If the Audit Committee identifies any concerns, they should be addressed as quickly as possible.

The Audit Committee should also review the financial records during September of each year as part of closing the books for taxes and when there is a transfer of the Section books to a new Treasurer. In addition, the Audit Committee should review and certify the annual Section financial report as prepared by the Section Treasurer and make a verbal report to the Executive Committee at the October monthly meeting.

The chair of the Audit Committee is appointed by the incoming Section Chair and at least one additional member recruited.

The Audit Committee Chair and member shall be active members of Chicago Section IFT. The Section Treasurer and any other Officer or Members having check signing authority should not serve on this Committee.

The Committee shall meet, at a minimum, during September to review the end of fiscal year financial records and in December to conduct the annual audit or prepare for the annual outside audit.

Awards & Nominating Committee Procedures

Awards Committee: The purpose of the Awards Committee is to oversee and administer:

- Strietelmeier Award (annually)
- JBT & RAP Scholarships at U of I (annually – with CFSF)
- The Ellery H. Harvey Service Award (annually)
- Chair's Achievement Award (every other year)
- New Member Award (annually, 1-2 members)
- Memorial Award (as required)

August – request that the Business Office orders a gavel for the incoming Chair

October

- ✦ Solicit nominations for open EXCOM and Officer positions.

December

- ✦ Attend JBT Scholarship Awards Banquet at the University of Illinois.
- ✦ Ask JBT Scholarship awardee to attend CSIFT Student event in March.
- ✦ Write article for CSIFT newsletter about JBT Scholarship recipients for Jan newsletter and update the website.
- ✦ Attend/ judge student product development class project presentations.

January

- ✦ Highlight Product Development class competition and TA (JBT) in FoodBytes article/photo
- ✦ Submit nomination ballot for review and approval by EXCOM at the January meeting.
- ✦ Submit approved ballot to IFT by deadline.

February

- ✦ Give update at CSIFT EXCOM meeting on Strietelmeier; update Strietelmeier application for current year, ensure website is updated.
- ✦ Open the Strietelmeier application process (give ~ 6 weeks). Promote Strietelmeier through Newsletter & Social Media. Provide info to Business Office.
- ✦ Scholarship Committee reviews criteria for awarding Strietelmeier Scholarship in April.
- ✦ Solicit nominations for the following awards:
 - The Ellery H. Harvey Service Award (annually)
 - Chair's Achievement Award (every other year)
 - New Member Award (annually, 1-2 members)

Awards & Nominating Committee

April / May

- ✦ Close the receiving of Strietelmeier applications. Committee meeting to identify Strietelmeier recipients.
- ✦ Close the receiving of Strietelmeier applications. Committee meeting to identify Strietelmeier recipients
- ✦ Initiate payments to U of I for scholarship support (JBT, RAP).
- ✦ Announce Strietelmeier Award awardees to Executive Committee.
- ✦ Notify Strietelmeier winners after CSIFT Executive Meeting. Include clear steps for reimbursement of funds.
- ✦ Notify the Business Office of the award winners for the following awards and ensure the plaques, etc., are ordered so they can be presented at the May meeting.
 - The Ellery H. Harvey Service Award (annually)
 - Chair's Achievement Award (every other year)
 - New Member Award (annually, 1-2 members)

June/July

- ✦ Participate (if possible) in Fun Run at IFT Annual Meeting.
- ✦ Ensure Strietelmeier recipients submit summaries and receipts for reimbursement and checks are issued.

August

- ✦ Identify Committee Members for upcoming fiscal year.

Ellery H Harvey Service Award & Chair Achievement Award:

In February of each year, the Awards Committee will start solicitation of the award nominations by submitting a nominations request in the Newsletter with a deadline of March 31st. The Business Office will create an online nomination form that is advertised in both the newsletter and on the website.

The Awards Committee (comprised of past chairs of the Chicago Section IFT) will select Section recipients for awards from those nominated and using the criteria for each award. The Chair of the Awards Committee will notify the Business Office of who is chosen prior to April 30 so that recognition plaques and checks or other awards can be awarded during the Annual Awards Ceremony at the May Tanner Lecture. The Chair of the Awards Committee will notify the award winners before April 30 and will write an article for the May Newsletter announcing the award winners. The Business Office will include this information on the website as well.

The Chair of the Awards Committee will invite the winner (s) to the Tanner Dinner along with a guest. The Chair of the committee will provide the recipient (s) and a guest a complimentary meal and a drink ticket for the event. The Chair will contact the Business Office with the names of the winner and guests so they will make reservations for them and charge to the Awards Committee budget. The

Awards & Nominating Committee

Chair of the committee will present the Section recipients with mementos and /or financial awards.

The Chair of the Awards Committee should update and maintain the list of award recipients and provide a copy annually to the Business Office for record keeping.

Nominating Committee: The purpose of the Nominating Committee is to develop a slate of Section officers for the Executive Committee's approval and the membership's vote. The Chair of these committees is automatically the Past Chair of the Section or someone chosen by the current Chair if the Past Chair is not available.

In October of each year, the Nominating Committee will write an article for the newsletter soliciting people who are interested in running for Chair-Elect, Secretary, Treasurer (if the three year terms is up for the current treasurer) and members of the Executive Committee/Board of Directors. The Chair will also reach out to current Secretary, and Treasurer to see if they want to run again and any Executive Committee/Board of Director whose term is ending in Aug of the following year.

In January, the Chair of the Nominating Committee will submit the slate of Officers and Executive Committee member candidates to the Executive Committee for approval. Once the slate of candidates is approved, short bios of each candidate are collected and submitted to the Business Office for inclusion in the January newsletter. The slate is also submitted to IFT for inclusion in the annual elections. The deadline to submit is usually Jan 31st and the elections are open in February and close in March.

Once IFT announces the winners to the Chair of the Nominating Committee, the winners are notified and the Chair provides this list to the Business Office for the website and to the Newsletter.

*** Note ** The Chair of the Awards & Nominating Committee must verify that anyone nominated for a position or an award must be in good standing with their IFT membership. Anyone that is not an IFT member will not be able to participate as an Officer, Executive Committee member, or be an award winner.*

New Member Award

Concept: An annual Award, to be granted to (1-2) new members for extraordinary volunteer service with the first five years (i.e., 5-years or less) of their membership with the Chicago Section – IFT.

Rationale:

- a. To recognize and encourage volunteer contributions by *new* members.
- b. To provide resume-building opportunities for *new* members.

Note: the CSIFT already awards an annual Ellery H. Harvey Service Award, but this is typically given to individuals, such as Section Chairs, that have given years of extended service to the CSIFT.

Execution:

- 1) Each February the Past chair will solicit nominations from the committee heads and Executive Committee.
- 2) If required, a survey will go out for informal ballot to ExCom to narrow down nominees to no more than 2 candidates
- 3) A physical award to which is to be affixed the name of the CSIFT member selected for the

Awards & Nominating Committee

award, to be awarded at the May Tanner Lecture.

- 4) Award to be noted in its physical form and with electronic recognition on the CSIFT web site.
- 5) CSIFT members selected be awarded a voucher to attend a dinner meeting of choice as well as fees for dinner meeting to receive award.

Memorial Award:

Concept: A *memorial award* for CSIFT Members who have passed away during or after extended and extraordinary service to the Chicago Section IFT.

Execution:

- 1) A virtual plaque to be added to the CSIFT webpage that includes the names, lifespan and date of election of those CSIFT members selected for the award.
- 2) CSIFT members selected for the award to be nominated by any member in good standing of the CSIFT.
- 3) CSIFT members selected for the award to be reviewed and approved by majority vote of CSIFT Officers and Executive Committee.
- 4) A physical plaque or stone memorial to be engraved with the name, lifespan and date of election of those CSIFT members selected for the award to be awarded to the family of the member.

Employment Committee

The purpose of the Employment Committee is to promote the posting of jobs on the CSIFT website and in the Career Center in LinkedIn and to assist those searching for jobs and companies looking to fill jobs.

Committee activities include the following:

- Review the job postings on the website regularly and post to LinkedIn weekly.
- Review the job postings on LinkedIn regularly to manage any “inappropriate” postings.
- Market the ability to post jobs to membership and encourage non-members to join CSIFT to gain this membership benefit.
- Coordinate and support initiatives to link job seekers with job openings.
- Support the Career Guidance Committee when planning events and the Symposium the morning of the annual Suppliers’ Expo.
- Support any Initiatives regarding student internships, job fairs, etc.
- Support the Hospitality Committee to plan Student Night seminars/workshops.

The Employment Chair will need to work closely with the Business Office to manage questions and content of the job posting online system and to manage any challenges that arise. A description of the system is listed below.

Online Job Posting System

The CSIFT website has a members-only Career Center where members can post and view job openings. Guidelines exist on its use, but may need to be updated if needed.

Viewing job postings: To access the job postings, members use the membership login button on the website. They then click on the “Career Center” link on the left. They can search for jobs by job category or location or any criteria in the search feature.

To view any specific job listing, just link on the job title and a full page opens with more information. The contact information is provided on this page as well.

Submitting a job posting: Access is provided the same way a job is viewed – just click on “submit a job” after clicking on the Career Center link in the members-only site.

Jobs are posted for 30 days or until the company removes it. This is an automatic system that does not require any manual procedures. Anyone/company can post a job.

LinkedIn Job Discussions

We also use the Chicago IFT LinkedIn site to post jobs. Members and non-members can post a job as long as they are members of the CSIFT LinkedIn. The Social Media Committee approves people who wish to join. Anyone in the food industry can be part of LinkedIn.

The Committee Chair is appointed by the Section Chair and shall appoint/recruit additional members as needed from the Section general membership.

Meetings are held as needed.

Finance Committee Procedures

The purpose of the Finance Committee is to serve as advisors to the Executive Committee and the Section on all Section financial matters, to assist the Treasurer and Section Chair in preparation of the Annual Budget, and to recommend to the Executive Committee when and how to invest all non-operating funds.

The Finance Committee will work together with all committees and the CSIFT Business Office to ensure that the annual budget is a **balanced budget** that accurately reflects the program and infrastructure goals for the coming year.

Duties:

- ⊕ Serve as advisor to the Treasurer and Business Office staff on maintenance and monthly reporting of all financial status reports.
- ⊕ Work with Treasurer and Section Chair to develop an Annual Budget during June/July of each year.
- ⊕ Work with Treasurer to assure proper distribution and investment of income and disbursement of funds dedicated to the Scholarship Funds.
- ⊕ Work with Treasurer to review Section financial reports.
- ⊕ Convene Finance Committee to decide recommended investments for surplus non-operating funds and provide recommendations to the Executive Committee for vote before investment.
- ⊕ Develop, maintain, and revise Section Financial Policy.
- ⊕ Participate in development of and review of the Profit and Loss / Budgets for the annual Suppliers' Expo and Golf Outing.

The Committee Chair is appointed by the Section Chair. The Committee Chair shall appoint/recruit additional members as needed from the Section general membership. Meetings shall be held as needed to conduct above duties.

Financial Policy

Detailed procedures for financial responsibility of the Section and Business Office can be found in a document entitled, "CSIFT Fiscal Policies and Procedures" dated 29 June 2019 (copy included in Handbook).

Section Budgeting

1. As the budget is developed during the summer of each year, there should be a goal of "reducing costs for the Section" as a minimum for most Section events. The primary revenue is gained from Suppliers' Night, and Annual Section Dues. Each event should be reviewed during the Budget Review process to determine if appropriate fees are being charged.
2. The budget shall be developed in accordance with the following schedule:
 - Initial request for budget information in April.
 - Submission of requests to Finance Chair / Treasurer by May.
 - Finance Committee Chair submits draft budget to Executive Committee in June for approval at the June business meeting.

Hospitality Committee Procedures

The purpose of the Hospitality Committee is to serve as a welcoming service to new Section members and guests at any Section meeting or event and to organize the annual Student Night. One of the ways that the committee helps to initiate networking opportunities, especially for First Time attendees, is by staging an Ice Breaker activity during the Social Hour. The activity has prizes for the participating winners.

Monthly Dinner Meetings

At each CSIFT monthly dinner meeting two volunteers are needed. One volunteer provides assistance at the registration table handing out badges and managing walk-in registrations.

The Business Office provides assistance at the registration table by bringing the registration list, the badges, and all walk-in registration payment processing materials.

At least one other volunteer is needed to provide a welcome to all first-time attendees. Each first-time attendee has a badge ribbon for easy identification. It is important to make them welcome so this volunteer ensures that during the social hour he/she introduces each “first-timer” to someone to eat with.

Raffle Prizes: The Hospitality Committee purchase or solicits raffle prizes for each dinner meeting.

Suppliers' EXPO

At the annual November Suppliers' EXPO members of the Hospitality Committee are needed to volunteer alongside the Membership Committee at the CSIFT table in the registration/social hour area to tell attendees about the Section and to answer any questions.

The Business Office and SN Committee create a volunteer schedule to ensure that there are 2 volunteers from noon to 6 PM.

Student Night

Student Night is significant effort and one that must be coordinated closely with the Business Office. The Student Night activities are coordinated and organized by the Committee in coordination with the Professional Development Committee / Career Guidance Committee and the Employment Committee.

Student Portfolios or other Giveaways: 30 days before the event, the Business Office needs to know what to order for the student giveaways and how many to order.

Volunteers: 60 days before the event, the Committee should begin advertising for volunteers to assist during the activities. The Business Office can assist with marketing for volunteers in the newsletter and the dinner meeting eblasts 30 days before the event. One week before the event, the Business Office needs a list of the volunteers in order to recognize them in the program.

Sponsors: A critical factor to ensuring the budgeting needs are met to cover the costs of the student meals is to have members and organizations sponsor student meals. Marketing for sponsors needs to begin 60 days before the event with the Committee soliciting companies for large donations. An estimated cost of the dinners is \$50.00 per student.

A second set of sponsors are needed to donate gift bags for the students.

One week before the event, the Business Office needs a list of all of the sponsors to include in the program.

Student Attendees: An accurate list of student attendees is essential. The Business Office must plan for seating and meals and print badges and programs for each student. A completed list needs to be provided to the Business Office the Thursday before the event.

Student Night Program: The Business Office will create and print the programs. Included in the program is recognition of volunteers and sponsors and any company that supports the event. In order to create the program, the Business Office needs final information no later than the Thursday before the event.

Host Section Committee Procedures

The purpose of the Host Section Committee is to provide locally based volunteer IFT Members from the Chicago Section IFT to assist the IFT in many of the activities at the IFT EXPO when it is held in Chicago.

Duties of the Committee include the following:

- ⊕ Organize the Committee in the fall of the year prior to IFT's Annual Meeting in Chicago, and seek willing Chicago Section IFT members to serve as Sub-Chairs-of the IFT HSA (Host Section Activities).
- ⊕ The Sub-Chairs will then seek willing volunteers to serve on their committee. The recommended number of volunteers is different per committee and supplied by IFT.
- ⊕ Organize several specific duty Committees with volunteers (e.g. Co-Chairs (2), Hospitality (20), Technical Tours (10), Speaker Rooms (25)
- ⊕ Sub-Chairs for each committee will schedule work assignments of these volunteers for working during IFT Annual Meeting EXPO.
- ⊕ The Technical Tours committee will work with IFT to source field trips to food companies outside the Convention Center and provide hosts to accompany these field trips.
- ⊕ The Co-chairs will prepare a final report on all Subcommittee activities for IFT within 30 days of the IFT Event, for use by next year's HSA. Report will be shared at the September CSIFT business meeting.

Specific responsibilities by sub-committee:

Technical Tours / Field Trips

The Technical Field Trip Co-Chairs plan, visit, and select Technical Field Trips which are unique to the area, as well as "technical" in scope. No trips should be planned that are readily available to the general public. The maximum number of participants per Field Trip should be limited to 45 (1 bus).

The Technical Field Trip Co-Chairs provide copy for the event website and Advance Program which consists of the field trip name, description, times, fees, restrictions, and special requirements. Two Hosts per field trip should be assigned to act as liaison for the facility and bus driver. Hosts are responsible for obtaining registration roster from IFT, collecting tickets at the bus and ensuring all participants return. Volunteers will be required to attend the Host Section tour of the Convention Center which will be scheduled prior to the meeting.

Generally consists of (2) Co-Chairs and (2) Hosts per Technical Field Trip.

Hours of Operation: Technical Field Trips may be scheduled on Monday or Tuesday between the hours of 8:00 a.m. – 5:00 p.m. including travel time.

IFT Responsibilities: The IFT Staff Coordinator will determine the pricing of the Technical Field Trips based on any fees charged by the facilities, meal cost (if applicable), busing costs and insurance costs (if applicable). The IFT Staff Coordinator will also contract for the necessary busses and monitor ticket sales for the Technical Field Trips.

Hospitality Committee

The primary responsibility of the Hospitality volunteer is to provide information and assistance to meeting attendees. Volunteers should be prepared to answer questions relating to area attractions, restaurants, cab fares, shuttle bus routes, directions to city activities, maps, sights, costs, certified and state approved babysitter services, location of meeting rooms, etc. It is suggested the volunteers know the location of all functions and attend the ANNUAL EVENT Host Section Tour of the Convention Center which will be scheduled prior to the meeting.

Generally, consists of (2) Co-Chairs and (18) volunteers. Location of the Hospitality Booth will be determined by IFT but will be located close to the registration. Coverage at the Headquarter Hotel will also be needed with location determined by IFT.

Hours of Operation are:

	Convention Center	Headquarter Hotel
Sunday	7:00am – 7:00pm	7:00am – 5:00pm
Monday	7:00am – 5:00pm	7:00am – 12:00
Tuesday	8:00am – 5:00pm	
Wednesday	8:00am – 4:30pm	

Speaker Room Committee

The Speaker Room is the hub for all scientific session and poster session activity. Speaker Practice Rooms are scheduled by the Speaker Room as well as the distribution of session materials and session attendance information.

The main responsibility of the Co-Chair is to staff the Speaker Room and assist IFT Staff with the operation of the Speaker Room. Duties include proofreading signs, preparing materials for sessions, poster set-up, and teardown, assisting speaker with downloading of presentations into PMS System, scheduling Speaker Practice Rooms, and assisting with Session Monitor duties if needed.

IFT Staff will always be present in the speaker room and will assist with managing the volunteer workers. All supplies and materials will be provided by IFT.

Hours of Operation are:

Sunday	9:00am – 5:00pm
Monday	6:30am – 5:00pm
Tuesday	7:30am – 5:00pm
Wednesday	7:30am – 4:00pm

IFT Responsibilities: IFT will order all supplies/equipment needed for the Welcome areas as required. The IFT Staff Coordinator will provide information on the location and number of entrances that will need to be covered.

The Committee Co-Chairs are appointed by IFT and the Committee Co-Chairs will appoint/recruit Sub-Committee Chairs and volunteer members from Section's general membership.

Planning meetings will be held periodically during year prior to Annual Meeting in Chicago.

The Business Office supports the Host Section Committee as required with no formal duties.

House Committee Procedures

The purpose of the House Committee is to provide the venues and menus for the 8 monthly dinner meetings each year.

- ⊕ Based on Program chair identified speaker and program needs for dinner meetings house committee shall select location, negotiate best price on contracts on behalf of the Section, select menu, and rent AV required by the Program Committee if needed.
- ⊕ Look into parking facility at the dinner meeting location and informed implication to the board in terms of cost and safety.
- ⊕ Choose venues in various suburbs and 1-2 in Chicago
- ⊕ Attempt to find one new venue each year with budget constraints
- ⊕ Ensure there is a separate room for EXCOM meeting set up and with water by 3:00 PM on meeting days
- ⊕ Utilize the checklist document found on the House Committee email account (ask Business Office for login information) to verify that all items have been addressed
- ⊕ Coordinate all meeting needs with Program Committee, Hospitality Committee, Tanner Lectureship Committee (as needed), and Marketing Committee (as needed).
- ⊕ Hold a planning meeting in April with the committees listed above
- ⊕ Hold menu tastings when needed
- ⊕ Hold meeting of entire House Committee prior to first Section monthly meeting to train members and hold additional meetings as needed before September meeting
- ⊕ Coordinate with the Business Office on the following activities:
 - Provide venue contracts to the Business Office to sign and to pay any deposits no later than July 1 of each year. Venues must take credit cards.
 - Provide menu information used for website and event marketing as well as for the payment / registration system no later than 60 days prior to each meeting.
 - Review invoice at the conclusion of each meeting prior to payment by the Business Office.
 - Write the monthly reports for the EXCOM meetings. The Business Office will provide the necessary data and information. Due the Wednesday before the next meeting.
 - Work with the Business Office to handle meal guarantees of meeting attendance at meeting places.
 - Invite Business Office to all planning meetings
- Budget approximately \$4,500 for House Committee dinner planning meetings, use of the EXCOM meeting room if not included in the standard venue contract, and for wait staff tips during menu tastings

Hold meeting of entire Committee prior to first Section monthly meeting to train members and hold additional meetings, as needed Hold menu tastings when needed.

Long Range Planning Committee Procedures

The purpose of the Long Range Planning Committee is to create and develop long-range concepts or programs for the improvement of the Section's activities.

The Committee is composed of Section members representing varied career interest, new members and members with long-term Section activity knowledge as well as of different membership levels (e.g., member, professional, emeritus, student).

The activities of the Committee include the following:

- ⊕ Review potential new or revised program proposals from the Committee members or directed from the Executive Committee.
- ⊕ Recognize limitations on new programs, based on member interest and availability, as well as budgetary requirements.
- ⊕ Submit all accepted concepts to Executive Committee for approval.
- ⊕ Work with the Business Office to assist with the implementation of Committee initiatives through task forces and/or existing committees.
- ⊕ Attend committee meetings (about 4 per year)

Goals Include:

- ⊕ Develop solid plans of action for CSIFT-driven culinary education projects, to be passed onto specific project task forces.
- ⊕ Continue surveying CSIFT membership for new ideas and initiatives, to be fleshed out and presented to the CSIFT chair and executive committee for consideration.
- ⊕ Identify additional ways to engage student members and new food industry professionals in CSIFT activities.
- ⊕ Identify and develop successor Chair for the LRP Committee.
- ⊕ Increase communication level with business office and other committees.

The Committee Chair is appointed by Section Chair and additional Committee members are appointed/recruited by Committee Chair from Section general membership (see above).

Meetings are held as needed.

Marketing Committee Procedures

The purpose of the Marketing Committee is to seek various relevant media outlets and actively promote Section activities to general membership and public with an integrated approach that connects the activities of the CSIFT committee's activities. This approach will continue to build the CSIFT brand equity and the value of membership.

As the Marketing Committee is the overall umbrella for several other committees, it is essential that the Marketing Committee provides leadership and coordinates with the leaders of the Marketing sub-committees listed below:

- ⊕ Social Media
 - CSIFT Marketing Committee Champions assigned to each committee
- ⊕ Sponsorship (Co-Chairs)
 - Direct, organize and develop sponsorship approach working with Co-Chair and the Business Office with the objective to meet sponsorship deliverables.
 - Champion, Direct Contact with Suppliers and Sponsors/VIP
- ⊕ Website: Need to determine monitoring changes (content managed by Business Office)

The Marketing Committee Chair

The Marketing Committee Chair is responsible for working with each Committee Sub-Committee Chair to develop an actionable "Integrated Marketing" strategy, plan, and coordinate its execution.

As the Marketing Committee is responsible for managing the brand of CSIFT it is also important that it works closely with the Membership Committee and the Business Office on matters concerning marketing of the Section and its events as well as with IFT to manage changes coming from IFT. In addition, the work of the Marketing Committee supports the activities of many committees, so it is important that the Marketing Committee members communicate regularly with the following committees:

- ⊕ Membership
- ⊕ New Professionals
- ⊕ Professional Development

All marketing materials such as banners, brochures, etc., will require coordination with the Business Office regarding content and use.

The Committee Chair is appointed by Section Chair and the Committee Chair recruits additional Committee Members as well as works with the leadership of its sub-committees to ensure that those committees function as needed.

The Marketing Committee Chair will schedule a teleconference each month (as necessary) to review marketing performance based on metrics defined by the Marketing Committee and EXCOM.

Social Media Sub-Committee

Social Media Sub-Committee

The social media chair is a two-part position. One of the roles of the social media chair is to coordinate and strategize all the platforms involved in social media. In these efforts, all outlets will be updated with relevant CSIFT/IFT information, industry news and events, and Chicago-related information.

He/She must ensure all outlets are updated accordingly, defined by the outlined Social Media strategy. The other key responsibility of the communication chair is to manage committee champions to ensure all marketing-related requests are reaching the marketing committee in a timely fashion. The communication chair must delegate these responsibilities, information and requests to the appropriate committee representative in coordination with the Marketing Committee Chair.

The purpose of the Social Media Committee is to manage the social media of the Section including:

- ✚ Facebook
- ✚ LinkedIn
- ✚ Twitter
- ✚ Instagram
- ✚ New technologies will be evaluated as needed

The Social Media Committee will manage the content and communications and recommend the appropriate communication medium to meet the section's needs.

- ✚ Membership - Engage current CSIFT members and recruit new members
- ✚ New Professionals – Engage and integrate to include under the CSIFT umbrella
- ✚ Professional Development
- ✚ Newsletter- Provide information on CSIFT events and Food-related Industry events with an emphasis of activities within the Chicago market.
 - Share IFT Weekly Newsletter – Align with all social media
- ✚ Website - monitoring changes (content managed by Business Office)

The Business Office will market events and the CSIFT FoodBytes Newsletter via Constant Contact. The Social Media chair will share events via Facebook and Twitter, etc.

All social media is open to anyone to post and the policies or rules for posting are documented on the social media platforms to ensure that the brand of CSIFT is healthy and accurate.

Membership Committee Procedures

The purpose of the Membership Committee is to assist the Chicago Section by demonstrating membership value to constituents and serve as the liaison to the membership body by retaining and engaging current members.

The responsibility for attracting new members and member retention is a responsibility for all Section Officers, Section Members, and Committee Chairs. We all shall actively be involved with representing the positive features of being a member of the Chicago Section IFT and promoting the benefits of membership and encourage participation in the Chicago Section IFT. Additionally, under Unified Membership with National IFT, the Membership Committee will encourage and facilitate efforts in conjunction with IFT for member recruitment.

Duties:

- Provide information for publication on the Section website and in the Section Newsletter.
- Coordinate with the Hospitality Committee to organize and staff the Section Membership booth at the annual Suppliers Night Expo.
- Contact new members and welcome them to the organization. The Business Office provides this information monthly after each Executive Meeting.
- Contact expired and dropped members to determine if they are willing to remain with the organization. The Business Office provides this information monthly after each Executive Meeting.
- Contact first-time attendees to CSIFT events to welcome them to the Section. The Business Office provides this information after each event.
- Distribute new member interests to the appropriate Section Officers or Committee Chairs.

Structure:

The Committee Chair (or Co-Chairs) is appointed by the Section Chair. The Committee Chair appoints / recruits additional members as needed from the Section general membership. The Committee Chair creates Sub-Committees as needed

Meetings are held as needed.

Annual Goals:

1. Retain current members
2. Engage current members
3. Recruit new members under Unified Membership
4. Recruit Student Members
5. Plan or coordinate engaging events that encourage social networking
6. Improve accuracy of our mailing lists and use them for mailings

Programs / Events:

The Membership Committee activities include the following:

- ⊕ Recruit companies to be Ambassadors
- ⊕ Post-Meeting Member Outreach (after each meeting)
- ⊕ Lapsed Member Outreach (monthly)
- ⊕ Pre-Meeting Outreach (before each meeting)
- ⊕ Membership Events (3-4 annually)
- ⊕ Student Outreach (as deemed necessary)
- ⊕ Suppliers Night On-Site Membership Drive (November)
- ⊕

The following schedule of activities is recommended:

June- May: 3-4 membership events planned throughout the year

August

- Ambassador appreciation Dinner: Invite all the ambassadors that have helped us during the year as well as invite new ambassadors that can help us during the year. Present each company with information about their company involvement, Business office will help pull data. Criteria to include: Sponsorships, expired members, events attended etc.

September – May

- Post Dinner Meeting Member Outreach: Email first time members, first time non-members, and non-member past attendees
- Lapsed Member Outreach: Email lapsed members.
- Pre-Dinner Meeting Outreach: target a segment of membership body that does not routinely attend dinner meetings and personally invite them. Criteria may include: proximity to meeting, topic reference, or other demographic variable. Business Office to assist pulling relevant lists.

November

- Suppliers' EXPO: Staff the Membership Booth.

New Professionals Committee Procedures

The purpose of the New Professionals Committee is to provide venues and forums for new food industry professionals to meet and network with their peers to advance their personal and professional goals while increasing active involvement in the Chicago Section IFT.

- Actively recruit new professionals within the Chicago Section network to participate in both New Professionals and Chicago Section IFT events.
- Schedule at least one New Professionals event per month during the CSIFT session (September – May) rotating between the city of Chicago and surrounding suburbs to maximize attendance.
- Represent the New Professionals at Chicago Section IFT events.
- Attend monthly EXCOM meetings (held before monthly dinner meetings) when possible.
- Submit a monthly report to the CSIFT Chair.
- Submit an article to be published in the monthly CSIFT newsletter.
- Work with the Business Office to update the New Professionals section of the CSIFT webpage and set up registration for events.
- Maintain a budget and submit expenses as needed.
- Ask for volunteers within the New Professionals group to assist other committees when requested.
- Upload pictures to the New Professionals section of the CSIFT webpage.
- Use Constant Contact to send out email blasts and update email list.
- Use social media to spread the word about events – Facebook, Twitter, and LinkedIn.
- Solicit sponsorships for New Professionals events from companies represented at CSIFT events.
- Reach out to Chicago Section universities and IFTSA to invite new grads/interns to participate in events.
- Submit an Annual Committee Report and budget by April 30th.

The New Professionals Committee is formed of a Chair or Co-Chairs and 1-3 Committee Members. Planning meetings will be held as needed.

Committee Volunteer Profiles –

- **Committee:** New Professionals
- **Role:** Plan networking and social events for new industry professionals to meet and connect.
- **Details:** Participate in committee discussions related to brainstorming and planning events where professionals who are new to the food industry can socialize and connect with each other to advance their personal and professional goals. Events are scheduled on average once per month.
- **Time Commitment:** 1-2 hours per month

Professional Development Committee Procedures

The purpose of the Professional Development Committee is to support the professional development of Section members and friends. The Professional Development Committee is the overall umbrella for the sub-committees listed below. The Chair of the Professional Development Committee leads the sub-committee chairs to ensure that the activities of each sub-committee are executed.

The purpose of the Professional Development Committee is to organize two types of events throughout the year; Technical Events & Career Guidance Events.

1. Technical Events provide targeted content valuable for professionals in the food industry
2. Career Guidance Events offer professional development opportunities that every business professional can learn from, not necessarily specific to food science.

We work closely with the CSIFT Business Office for all scheduling, signing of contracts, and marketing of different events as well as with the Hospitality, House, Long Range Planning, Marketing Committees

Positions:

- 1) Chair
- 2) Co-Chair
- 3) Marketing lead

The Committee Chair is appointed by Section Chair. The Professional Development Chair appoints the co-chair and marketing lead.

Monthly update calls that last about 30min for our team to connect, regroup, and divide up work.

The Committee Chair is appointed by Section Chair. The Professional Development Chair appoints the sub-committee chairs. The sub-committee chairs recruit additional sub-committee members to ensure that the respective sub-committees' activities are carried out.

The Committee will meet as necessary.

Annual Suppliers' Symposium

The Program Committee supports the Annual Suppliers' Symposium by conducting a call for papers / speakers in April each year. The speakers are chosen no later than May 31. At least one representative from the Committee is responsible for introducing the speakers at the event whether in person or virtually.

This work is in coordination with the Business Office and the Suppliers Expo Committee.

Professional Development Committee

Career Guidance Sub-Committee

Career Guidance

The purpose of the Career Guidance sub-committee is to identify, promote and coordinate educational/soft-skill development opportunities of interest to the Food Science profession.

(I) Prior to event

- (1) Seek out and confirm topics, speakers and location at least 3-6 months in advance
- (2) Gain commitment from the hosting organization
- (3) Negotiate best price, arrange contract for space rental, select menu and make AV arrangements
- (4) Gain approval from the Professional Development Chair for speaker, topics, location, pricing
- (5) After gaining approval from the Professional Development Chair, provide information to the Business Office to
 - (a) sign all contracts
 - (b) start promotions at least 60 days prior to the event and to continue weekly
 - (c) collect meeting registrations, attendee payments, prepare attendee name badges and handle all funds (income and payments)
 - (d) handle meal guarantees at meeting places
 - (e) handle payments to the speaker and venue

(II) during event

- (1) Arrange for on-site feedback survey to take place
- (2) Arrange for random raffle giveaway for event attendees
- (3) Staff the registration table beginning 45 minutes prior to the start of the event (eg: 8:15am for a 9:00am program)
- (4) Take photos of the event

(II) after event

- (1) Send expense reimbursement forms to the Professional Development Chair for approval. The Professional Development Chair will forward the approved forms to the Business office for reimbursement to the sub-committee chair/member.
- (2) Write a summary article of the event and forward to the Professional Development Chair for approval. The Professional Development Chair will collate all sub-committee articles and submit an umbrella Professional Development article to the Business office for newsletter distribution.

The continuing education sub-committee chair is appointed by the Professional Development Chair. The continued education sub-committee chair recruits additional members from the Section general membership.

Technical Sessions Procedures

The purpose of the Technical Sessions Sub-Committee is to provide content that is valuable and targeted specifically towards professionals in the food industry. .

(I) prior to event

- (1) Seek out and confirm topics, speakers and location at least 3-6 months in advance
- (2) Gain commitment from the hosting organization
- (3) Negotiate best price, arrange contract for space rental, select menu and make AV arrangements
- (4) Gain approval from the Professional Development Chair for speaker, topics, location, pricing
- (5) After gaining approval from the Professional Development Chair, provide information to the Business Office to
 - (a) sign all contracts
 - (b) start promotions at least 60 days prior to the event and to continue weekly
 - (c) collect meeting registrations, attendee payments, prepare attendee name badges and handle all funds (income and payments)
 - (d) handle meal guarantees at meeting places
 - (e) handle payments to the speaker and venue

(II) during event

- (1) Arrange for on-site feedback survey to take place
- (2) Arrange for random raffle giveaway for event attendees
- (3) Staff the registration table beginning 45 minutes prior to the start of the event (eg: 8:15am for a 9:00am program)
- (4) Take photos of the event

(II) after event

- (1) Send expense reimbursement forms to the Professional Development Chair for approval. The Professional Development Chair will forward the approved forms to the Business office for reimbursement to the sub-committee chair/member.
- (2) Write a summary article of the event and forward to the Professional Development Chair for approval. The Professional Development Chair will collate all sub-committee articles and submit an umbrella Professional Development article to the Business office for newsletter distribution.

The technical sessions sub-committee chair is appointed by the Professional Development Chair. The technical sessions sub-committee chair recruits additional members from the Section general membership.

Program Committee Procedures

The purpose of the Program Committee is to identify topics and speakers for the monthly Section dinner meetings. The Chair Elect serves as the Chair of the Program Committee. The annual CSIFT Leadership Training Workshop is planned and organized by the Chair Elect. The final responsibility of the Program Chair / Chair Elect is to work with the Section Chair on all matters concerning the management of the Section.

The Chair-Elect / Program Chair is encouraged to recruit 2-3 volunteers to assist with Program Planning. The volunteers can help with theme and topic ideas, networking speaker contacts, and coordination of events. Additionally, in the event that the Chair-Elect is unable to attend a meeting, the committee volunteers can be present to ensure things go smoothly.

Monthly Dinner Meetings / Speakers / Monthly Program Recap

Schedule: In April, the incoming Chair Elect establishes the dinner meeting dates for the following year. Dates selected should take into consideration religious holidays and when the Chicago Bears play on Monday Night Football in an effort to be inclusive and optimize attendance. The dates are presented at the May meeting for EXCOM voting and approval. The Business Office will create a calendar / schedule for the website and all marketing for the upcoming year.

The Program Committee Chair is encouraged to work in conjunction with the House and Marketing Committees when picking dates and speakers to align with locations and promotional objectives.

Topics: The Program Chair has authority to identify the speaker and topics. Guidance on topics can often be obtained from surveys of the Section Membership. Speaker and speaker topics are critical for dinner meeting attendance, so attendance should have strong consideration when selecting the topics and speakers.

The Program Chair can also consider having a “theme” for the year’s meetings. This will provide continuity between meetings and help guide the Program. The Chair is encouraged to work with Marketing and the sections Chair and Past Chair when developing a topic or theme strategy.

Speakers: Ideally, a tentative list of speakers would be proposed at the May meeting. Agreement with each speaker on their date to present, a biography, speaker title and photograph should be received by the Business Office by August 1 for the upcoming fiscal year. This allows the Section to effectively market the full dinner meeting schedule as some people from out of state will make plans to attend the dinner meeting.

Forms are required at least 60 days in advance of each speaker. The speakers should be asked for permission to publish a pdf version of their presentation in the FoodBytes Newsletter after the meeting and to store it in the CSIFT members-only Knowledge Center on the website. The **speaker presentation form** should be used to gather this information. The form is included in the Appendices.

Five days prior to the meeting, the full presentation should be provided to the Business Office and

it will be uploaded onto the CSIFT laptop and a copy made onto a memory stick as a backup. The Program Chair is encouraged to work closely with the Business Office to coordinate and communicate needs and status of received items prior to the meetings. The speaker meal and dietary concerns need to be communicated to the Business Office at least 5 days in advance.

Dinner Meetings: The day of the meeting, arrangements should be made to ensure that the speaker's travel needs are met and that he/she is welcomed during the social hour. A table will be reserved for the Chair, Chair Elect, and the speaker at the dinner meeting. Work with the House Committee to ensure this is completed. The Program Chair should find attendees to fill the table ahead of time so the table does not remain empty or partially full.

A speaker gift can be purchased by the Program Committee or the information can be provided to the Business Office for purchase. The Program Chair will introduce the speaker and help facilitate questions following the presentation.

The Business Office will ensure that the speaker has a badge, a Certificate of Appreciation, and a dinner reservation.

If the topic qualifies, the National IFT may allow for Certified Food Science (CFS) continuing Education Points to be awarded for attendance. The Business Office will work with IFT to confirm eligibility.

Monthly Program Recap: Following the monthly dinner meeting, the Program Chair will write a recap of the presentation that will be published in the upcoming newsletter. This is typically due a few days following the Dinner Meeting.

Special Meetings: Occasionally, a term will include a special meeting or year such as a milestone anniversary year. Special consideration and planning may be required, and as such it is recommended that a Task Force is identified well in advance that comprises of representation from Programs, House, Marketing, and ExCom. Additional planning and budgetary considerations may also be required.

Section PowerPoint: When available, a PowerPoint presentation is played in a loop prior to dinner meetings that contains promotional information about the section, membership opportunities, CFS points, Volunteer openings and needs, and event promotion. The Program Chair is encouraged to work with other committees (Membership, Marketing, New Professionals, Professional Development, Golf Outing etc.) to gather information to populate the presentation. The Business Office can assist.

Annual Leadership Training Workshop

The Chair Elect plans the Annual Leadership Training Workshop. The date and location of the Leadership Workshop should be determined no later than April 1 of each fiscal year. The date of the Leadership Workshop usually occurs early June, though this time is dependent upon when the IFT Annual Meeting is scheduled. The Leadership Workshop should not occur no later than mid-August.

The workshop schedule and content should be finalized approximately 30 days before hand. The Business Office will arrange for and sign the contract for the location of the event and will coordinate with the venue for food and beverage. The Business Office can also assist with managing the registrations for the workshop.

The purpose of the Annual Leadership Training Workshop is two-fold:

- 1) Provide a forum for discussion, planning, and execution of objectives for the upcoming year
- 2) Serve as a Thank You event for Leadership.

The event should always include the Executive Committee and Officers, but can also include Committee Chairs and Committee Volunteers.

Coordination with the Section Chair

The role of the Chair Elect is to support the Section Chair doing the work of the Section. The Business Office will cc the Chair Elect on all email communications with CSIFT leadership in order to ensure that the Chair Elect is aware of any issues or concerns. Meetings can be scheduled with the Business Office at the convenience of the Chair Elect in order to plan the work and strategic direction of the Section.

Tanner Lectureship Responsibilities

As of 2020, Program Chair will be responsible for finding the tanner lecture speaker with the help of the Chair and Past-Chair. Please see the Tanner Lecture Committee Page for full responsibilities.

Budgetary Considerations

Monthly Dinner Meetings:

- Speaker travel & hotel fees
- Speaker Honorarium (not encouraged, but sometimes required)
- Speaker Gift – Generally \$50-75 value.
- Suggest at least 1 meeting / year be professionally video recorded. Business Office can provide budgetary guidance based on current third party bids
- Parking – usually covered by House committee, but occasionally a shared expense with House and Programs. Communication required.

Annual Leadership Training

- Venue cost
- Food / Drink cost
- Speaker Cost (not required, but can be considered)
- Entertainment Cost if applicable

Sergeant-at-Arms / By-Laws Committee Procedures

The purpose of the Sergeant-at-Arms / By-Laws Committee is to determine annually, or as needed, that the Section By-Laws are current and, as necessary, develop modifications to the By-Laws for approval by the Section Leadership and IFT.

Under Unified Membership the additional purpose is to also manage the IFT Affiliation Agreement and monitor any changes.

The third responsibility of the Sergeant-at-Arms is to ensure that all EXCOM meetings are run according to Roberts Rules of Order and the CSIFT By-Laws.

The Committee Chair is appointed by the Section Chair and the Committee Chair shall appoint/recruit additional members as needed from the Section general membership.

Meetings are held as needed.

Suppliers' Symposium & Expo Committee

Suppliers' Symposium and Expo Committee Procedures

The purpose of the Suppliers' Symposium and Expo Committee is to coordinate all activities associated with the annual Chicago Section IFT Suppliers' EXPO. The EXPO is held every November.

Subcommittees include the groups below. Their duties are part of the procedures completed by the month.

- ✦ Sponsors
- ✦ Hospitality / Housing
- ✦ Volunteers
- ✦ Symposium – managed by Professional Development Committee

It is important that the Suppliers' Symposium and Expo Committee works closely with the Business Office to ensure a successful event as the proceeds from the event strongly support the income of the Section each year. The Committee Chair will also need to work closely with leadership of the sub-committees.

There are many activities associated with the Suppliers' Symposium and Expo and the work of this committee continues throughout the year.

1. In discussion with the Chicago Section Executive Committee, determine the type and nature of the event and/or events that will make up the annual Section Suppliers' Night EXPO.
2. Negotiate and/or review all EXPO contracts and planned expenditures. The Business Office will sign all contracts.
3. Reserve the Suppliers' Night EXPO location three (3) years in advance.
4. Determine the appropriate location and venue for the chosen series of events making up the EXPO.
5. Prepare an annual budget and provide periodic reports to the Section Executive Committee regarding the proposed financial status of the event.
6. Coordinate and review EXPO related mailings, brochures, program, advertisements and other marketing materials for handling by the Business Office.
7. Coordinate efforts for all types of registrations, both prior to the event and during the event.
8. Recruit and train sufficient volunteers for EXPO events.
9. Set up subcommittees as needed to coordinate, plan, and staff chosen events at Suppliers' Night to help promote the EXPO.
10. Promote the EXPO at other organization functions.
11. Draft EXPO related articles to be included in press releases, newsletters, and website.
12. Prepare and submit final report that includes financials to Executive Committee within two (2) months of Suppliers' Night.
13. Assure that all submittals, approvals, permits, etc., needed for the event are obtained on a timely basis

Suppliers' Symposium & Expo Committee

It is important that the following schedule is managed to ensure that the event is successful:

1. **April:** Conduct Call for Papers for Symposium
2. **May:** Select program for Symposium
3. **July:** Begin strong marketing to solicit ads for the Exhibitor Guide and all other sponsors.
4. **August**
 - a. Begin strong attendee marketing using all media available
 - b. Magazine ads submitted to magazines
5. **September:**
 - a. All sponsors should be in place and sponsors for the Exhibitor Guide finalized
 - b. All food and beverage ordered for social hour and morning refreshments
 - c. Continue attendee marketing using all media available
 - d. Determine any changes to the floor plan for next year's show.
6. **October**
 - a. Final booth sales
 - b. Continue attendee marketing using all media available
 - c. Review draft Exhibitor Guide
 - d. Solicit volunteers to work the registration tables the day of the event
 - e. Work with the Hospitality and Membership Committees to work the CSIFT booth / table at the event.
 - f. Finalize all marketing materials for the next year's show and anything needed to ensure that booth reservations can begin 2 weeks after the show ends. All information needed for booth registration needs to be completed by October 1.
7. **November**
 - a. Ensure all food and beverage is ordered
 - b. Ensure all volunteers are in place.
 - c. Conduct a survey to get feedback from exhibitors and attendees
 - d. Sponsor, volunteer, and broker registration opens 2 weeks after the show.
8. **December**
 - a. Registration opens for exhibitors in priority order.
 - b. Work with the Business Office to acquire the data and information needed to write EXCOM report.
9. **January**
 - a. Create a budget for the next year's show.
 - b. Hold a meeting to discuss show and to plan for any necessary changes including costs / fees to develop the budget.
10. **February – June:** Market event and work with the Business Office to manage registrations and any potential issues.

The Committee Chair is appointed by the Section Chair and the Committee Chair shall appoint/recruit additional members as needed from the Section general membership. Meetings are held as needed.

Tanner Lectureship Committee Procedures

The purpose of the Tanner Lectureship Committee is to select qualified nominations for the annual Tanner Lectureship, and to select and promote the award recipient for the May meeting. This committee will be composed of the Past Chair, Chair, and Chair-Elect/Program Chair and run by the Program Chair.

The following activities support this purpose:

- Promote solicitation of qualified nominations for Tanner Lectureship Award recipient, starting in September-December.
- Select award winner by February 1st (ideally as early as possible so it is included in monthly marketing during the year).
- Obtain needed bibliography and the title and abstract of the topic to be presented. Provide to the Business Office so they can promote event on Section's website and in Section's monthly Newsletter and via social media a minimum of 60 days prior to dinner.
- Coordinate with Section's Business Office to prepare award payment, engraved plaque, and printed program brochures.
- Coordinate with House Committee to select appropriate venue and to plan menu and reception hors d'oeuvres.
- Make official announcement on Section's website and in Section's monthly Newsletter and on national IFT website and in Food Technology magazine.
- Host the speaker before and during Tanner Lecture event at Section's May monthly meeting event, including introduction of speaker.
- If possible, host a Tanner luncheon on the day of the event, including Tanner Awardee and Tanner Committee members.
- Submit final expense report to the Section's Business Office to reimburse all expenses incurred during the event.
- Write a post-event summary to be published in Section's newsletter.

The Committee Chair is appointed by the Section Chair and the Committee Chair shall appoint/recruit additional members as needed from the Section general membership. Meetings are held as needed.

Budget considerations

1. \$3,000 honorarium for the presenter
2. ~ \$200 for a Plaque
3. \$2,000 for international travel expenses if needed

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Appendix A: Past Chicago Section Chairs

Appendix A: Past Chicago Section Chairs

1941	Ellery H. Harvey	1981	Thomas Topalis
1942	G. Victor Hallman	1982	Luci Landberg
1943	Milton E. Parker	1983	Charles Bates
1944	Milton L. Laing	1984	Leah Lyon
1945	John T. Knowles	1985	Donald Davies
1946	Roger V. Wilson	1986	Rudolph Ellinger
1947	C.C. Ziegler	1987	Louis J. Bianco
1948	E.S. Stateler	1988	David M. Strietelmeier
1949	Charles L. Smith	1989	Fred Maass
1950	Rohland A. Isker	1990	Deborah Becker
1951	Berton S. Dark	1991	Hank Warmbier
1952	Virgil O. Wodicka	1992	Dean Duxbury
1953	George E. Brissey	1993	Mary O'Connor
1954	Stan F. Brockington	1994	Patrick Sullivan
1955	John M. Jackson	1995	Robert Dean
1956	William J. Mutschler	1996	Art Siedler
1957	Clarence K. Wiseman	1997	Linda Kragt
1958	Clifford F. Evers	1998	Donna Gorski Berry
1959	George W. Beach	1999	Erica Reiner
1960	Herbert E. Robinson	2000	Norman Singer
1961	Dorothy Ann Huber	2001	David LeVally
1962	Louis G. Buettner	2002	Linda Perucca
1963	Bruce Morgan	2003	Sue Monckton
1964	Gale Ammerman	2004	Joe Stout
1965	James Albrecht	2005	Tricia Giron
1966	Richard D. Trelease	2006	Matt Hutchinson
1967	William A. Brittin	2007	Dan Best
1968	C. Richard Myers	2008	Anna Lovis
1969	Joseph W. Hanley	2009	Diane Dawson
1970	John Murphy	2010	Pamela Vaillancourt
1971	Eric Engel	2011	Uwe Nienaber
1972	Richard Schranz	2012	Vijay Arora
1973	Robert Meidel	2013	John Chambers
1974	F. Glen Connick	2014	John Budin
1975	James Vetter	2015	Glenn Bluemer
1976	Gerald Cooper	2016	Joy Dell'Aringa
1977	William Klinker	2017	Ivonne Litwin
1978	Charles Beck	2018	Mike Carson
1979	Roy Hiavacek	2019	Jennifer Farrell
1980	Charles Radanovics		

Appendix B: Past Chicago Section Award Winners

B.1: Chicago Section IFT Chair's Achievement Award

Appendix B: Past Section Award Winners

B.1: Chicago Section IFT Chair's Achievement Award

Purpose: To recognize an outstanding achievement in Food Science by honoring the person or persons responsible; offered every other year.

Eligibility: Chicago Section Members only.

Award: The award shall consist of a \$250 honorarium, an inscribed plaque, and expenses of the awardee to the meeting at which the award is presented.

Deadline for receipt to the immediate past Chairman is not later than March 30th.

Past Awardees

1975	Arnold W. Johnson
1979	Arthur J. Siedler
1986	William A. Golomski
1988	John W. Erdman
1992	George Inglett
1994	Lou Bianco
1996	Norman Singer
1998	George Muck
2000	James R. Schultz
2002	Charles Sizer
2004	Hans Blaschek
2006	Barbara Klein
2008	Vijay Arora
2010	Shelly J. Schmidt
2012	Richard Mateles
2014	Robert F. Boutin
2016	Gary List
2018	John Budin
2019	John Ruff

Appendix B: Past Chicago Section Award Winners

B.2: Ellery H. Harvey Service Award

B.2: Ellery H. Harvey Service Award

Each year the Chicago Section IFT recognizes an outstanding volunteer who has distinguished him or herself in the service of the Chicago Section IFT by awarding them the **Ellery H. Harvey Service Award**. This award is named after the founding chair of the Chicago Section IFT from 1941 whose passion for the profession helped form the first and largest section of the Institute of Food Technologist.

PURPOSE: To recognize an outstanding CSIFT Member who has distinguished himself or herself in the service of the Chicago Section IFT; presented every year.

ELIGIBILITY: Chicago Section Members only, excluding jury and elected officers for the year.

AWARD: The award shall consist of a \$200 honorarium, a scroll and expense of the Awardee to the meeting at which the award is presented.

Deadline for receipt to the immediate past Chairman will not be later than March 30.

AWARDEES

1975 Elwood F. Caldwell	1999 Krista Ruhnke
1976 Dorothy Ann Huber	2000 Kristine Campbell
1977 Robert E. Taylor	2002 Pat Sullivan
1978 Donald L. Davies	2003 Joy Engels
1979 James A. Freck	2004 Tricia Giron
1980 Luci Landberg	2005 Linda Perucca
1981 Stan Tolin	2006 Susan Monckton
1982 Byron Shinn	2007 Mona Reinhard
1983 Joachim Staackmann	2008 David Mehnert
1984 Charles Radanovics	2009 Matthew Hutchinson
1985 F. Glenn Connick	2010 Daniel Best
1988 Ralph S. Wirebaugh	2011 Anna Lovis
1989 Gerald Cooper	2012 Jan Miller
1990 Dean Duxbury	2013 Manoj Shah
1991 Linda Kragt	2014 Uwe Nienaber
1992 David Strietelmeier	2015 John Fenstermacher & Michael Hosler
1994 Charles Lourich	2016 John Chambers
1995 Joseph Stout	2017 Nancy Moriarity
1996 William Klinker	2018 Laura Saran
1997 David LeVally	2019 Joy Dell'Aringa
1998 Fred Maass	2020 Ivonne Litwin

Appendix B: Past Chicago Section Award Winners

B.3: The Nicholas Appert Award

B.3: The Nicolas Appert Award

The Nicolas Appert Award has been awarded every year since 1942 by the Chicago Section of the Institute of Food Technologists. Given for lifetime and consistent achievement in food technology, it is named after Nicolas Appert, the French inventor of airtight food preservation. Award winners receive a bronze medal with a front view of Appert from the Chicago Section of IFT and a USD 5000 honorarium from IFT. This is considered one of the highest honors in food technology.

1942 William V. Cruess	1968 Donald K. Tressler	1994 Roy L. Whistler
1943 Samuel C. Prescott	1969 Edwin M. Foster	1995 Philip E. Nelson
1944 C.E. Browne	1970 Samuel A. Goldblith	1996 Michael P. Doyle
1945 A.W. Bitting	1971 Reid T. Milner	1997 H. C. Rudolf Heiss
1946 C.H. Bailey	1972 John C. Ayres	1998 Theodore P. Labuza
1947 C. Olin Ball	1973 Hans Lineweaver	1999 Robert G. Cassens
1948 C.A. Elvehjem	1974 George F. Stewart	2000 Aaron L. Brody
1949 Roy C. Newton	1975 Ernest J. Briskey	2001 Adolph S. (Al) Clausi
1950 Thomas M. Rector	1976 Amihud Kramer	2002 Daniel F. Farkas
1951 A.E. Stevenson	1977 Richard L. Hall	2003 Dietrich Knorr
1952 Edward M. Chace	1978 Jasper Guy Woodroof	2004 Larry R. Beuchat
1953 Victor Conquest	1979 F.J. Francis	2005 Gustavo V. Barbosa-Cánovas
1954 Charles N. Frey	1980 Evan F. Binkerd	2006 George E. Inglett
1955 Charles G. King	1981 Bernard S. Schweigert	2007 Todd R. Klaenhammer
1956 Bernard E. Proctor	1982 Clinton O. Chichester	2008 Gilbert A. Leveille
1957 Emil M. Mrak	1983 Steven S. Chang	2009 Daryl Lund
1958 William F. Geddes	1984 John J. Powers	2010 R. Paul Singh
1959 Berton S. Clark	1985 Alina S. Szczesniak	2011 Dr. Malcolm Bourne
1960 Ernst H. Wiegand	1986 Marcus Karel	2012 Casimir Akoh
1961 Helmut C. Diehl	1987 Elmer H. Marth	2013 Kenneth R. Swartzel
1962 Arnold Kent Balls	1988 Owen R. Fennema	2014 Patrick Dunn
1963 Karl F. Meyer	1989 Fergus M. Clydesdale	2015 Stephen F. Taylor
1964 Gail M. Dack	1990 Myron Solberg	2016 E. Allen Foegeding
1965 Harold W. Schultz	1991 Raymond J. Moshy	2017 Jozef Kokini, Ph.D
1966 Maynard A. Joslyn	1992 Irving J. Pflug	2018 Dennis Heldman, Ph.D
1967 Michael J. Copley	1993 Wilbur A. Gould	2019 Dr. Julian McClements

Appendix B: Past Chicago Section Award Winners

B.4: Tanner Lectureship Awardees

B.4: Past Fred W. Tanner Lectureship Awardees

The Chicago Section IFT established the Fred W. Tanner Lectureship in 1960 to advance the profession and practice of food science by bringing to the Section outstanding scientific persons, in this field or its related sciences, to speak on recent advances in the formulation, processing, preservation, packaging, distribution, preparation, nutritional quality, and enjoyment of food.

Fred Wilbur Tanner (1888-1957) was an American food scientist, microbiologist and professor at the University of Illinois who served in the founding of the Institute of Food Technologists (IFT) and was the founder and one of the editors for the scientific journal Food Research, now called the Journal of Food Science. Dr. Tanner served as IFT President 1945-46, was author of more than 150 publications in microbiology and public health, would win the Stephen M. Babcock Award (now called Babcock-Hart Award) and was posthumously awarded the Pasteur Award.

- 1963 **B.S. Platt**, Ph.D., M.B., Ch.B., Director of the Human Nutrition Research unit of the Medical Research Council, Mill Hill, London.
- 1964 **John M. Kuprianoff**, Sc.D., Director, Federal Institute for Food Preservation, Karlsruhe, Germany.
- 1965 **Lloyd M. Beidler**, Ph.D., Professor of Biophysics, Florida State University, Tallahassee, FL.
- 1966 **S.M. Partridge**, Ph.D., Head, Department of Protein Chemistry, Meat Research Institute, Cambridge, UK
- 1967 **Fredrick J. Stare**, M.D., Ph.D., Chairman, Department of Nutrition, Harvard School of Public Health, Boston, MA.
- 1968 **Fred S. Thatcher**, Ph.D., Chief, Division of Microbiology Research Laboratories, Food & Drug Directorate, Ottawa, Ontario, Canada.
- 1969 **Emil M. Mrak**, Ph.D., Chancellor, University of California, Davis, CA.
- 1970 **Morley R. Kare**, Ph.D., Professor of Physiology and Director, Monell Chemical Senses Center, University of Pennsylvania, Philadelphia, PA.
- 1971 **James R. Vickery**, Ph.D., Commonwealth Scientific and Industrial Research Organization, Division of Food Preservation, Australia (Retired).
- 1972 **E.M. Foster**, Ph.D., Director, Professor of Bacteriology, Food Research Institute, University of Wisconsin, Madison, WI.
- 1973 **Calvin A. Lang**, Sc.D., Professor of Biochemistry and Director, Biological Aging Program, University of Louisville School of Medicine, Louisville, KY.
- 1974 **Rose Marie Pangborn**, M.S., Professor of Food Science and Technology, University of California, Davis, CA.
- 1975 **Jean Mayer**, Ph.D., Sc.D., Professor of Nutrition, Department of Nutrition, Harvard School of Public Health, Boston, MA.
- 1976 **Steven R. Tannebaum**, Ph.D., Professor of Chemistry, Massachusetts Institute of Technology, Cambridge, MA.
- 1977 **Alexander M. Schmidt**, M.D., Vice Chancellor for Health Services, University of Illinois Medical Center, Chicago, IL.
- 1978 **Aaron M. Altschul**, Ph.D. Professor and Head, Department of Community Medicine and Internal Health, Georgetown University, Washington D.C.
- 1979 **Thomas H. Jukes**, Ph.D., Professor, Medical Physics, University of California, Berkeley, CA.

Appendix B: Past Chicago Section Award Winners

B.4: Tanner Lectureship Awardees

- 1980 **Sylvan H. Wittwer**, Ph.D., Director of the Agricultural Experiment Station, Michigan State University, East Lansing, MI.
- 1981 **L.J. Filer**, Jr., M.D., Ph.D., Professor of Pediatrics, College of Medicine, Iowa City, IA.
- 1982 **Walter Mertz**, M.D. Director of Beltsville Human Nutrition Research Center, U.S. Department of Agriculture, Beltsville, MD.
- 1983 **David Kritchevsky**, Ph.D., Associate Director, , Philadelphia, PA.
- 1984 **David A. McCarron**, M.D., Director, Hypertension Program, The Oregon Health Sciences University, Portland, OR.
- 1985 **Fergus M. Clydesdale**, Ph.D., Professor of Food Science and Nutrition, University of Massachusetts, Amherst, MA.
- 1986 **Michael P. Doyle**, Ph.D., Assistant Professor, Food Research Institute, University of Wisconsin, Madison, WI.
- 1987 **Richard L. Hall**, Ph.D., Vice President of Science and Technology, McCormick & Co., Inc. Hunt Valley, MD.
- 1988 **Douglas L. Archer**, Ph.D., Director, Division of Microbiology, U.S. Food & Drug Administration, Washington D.C.
- 1989 **Gilbert Leveille**, Ph.D., Vice President, Research and Technology, Nabisco Brands, Inc., East Hanover, NJ.
- 1990 **Alina S. Szczesniak**, Sc.D., former Principle Scientist, General Foods Corporation.
- 1991 **John E. Kinsella**, Ph.D., Dean of the College of Agriculture & Environmental Sciences, University of California, Davis, CA.
- 1992 **Marcus Karel**, Ph.D., Professor of Food Science, Rutgers – The State University of New Jersey.
- 1993 **Susan Schiffman**, Ph.D., Professor of Medical Psychology, Duke University, Durham, NC.
- 1994 **Roy L. Whistler**, Ph.D., D.Sc. Hillenbrand Distinguished Professor of Biochemistry Emeritus, Purdue University, West Lafayette, IN.
- 1995 **Owen Fennema**, Ph.D., Professor of Food Chemistry, University of Wisconsin, Madison, WI.
- 1996 **Robert T. Fraley**, Ph.D., President, Ceregen Unit of the Monsanto Company.
- 1997 **Alan W. Holmes**, Ph.D., O.B.E. former Director of British Food Manufacturing Industries Research Association at Leatherhead.
- 1998 **Arthur J. Morgan, Jr.**, Ph.D., U.S. Agricultural Research Service, Eastern Regional Research Center.
- 1999 **Philip Nelson**, Ph.D., Director of Food Science, Purdue University, West Lafayette, IN.
- 2000 **Gary K. Beauchamp**, Ph.D., Director, Monell Chemical Senses Center, University of Pennsylvania, Philadelphia, PA.
- 2001 **Milos Kalab**, Ph.D., Ph.D., Southern Crop Protection and Food Research Centre, Guelph, Ontario, Canada.
- 2002 **Samuel Palumbo**, Ph.D., Research Microbiologist, USDA, Eastern Regional Research Center, MD and PA.
- 2003 **Terry E. Acree**, Ph.D., Professor of Biochemistry, Cornell University, Geneva, NY.
- 2004 **Louise Slade**, Ph.D., and **Harry Levine**, Ph.D., Kraft Foods Fellows, Kraft Foods, East Hanover, NJ.
- 2005 **Donald B. Thompson**, Ph.D., Professor of Food Science, Pennsylvania State University, University Park, PA.
- 2006 **Beverley J. Kroll**, CEO, Peryam & Kroll Research Corporation, Chicago, IL.
- 2007 **Theodore P. Labuza**, Ph.D., Professor of Food Science and Engineering, University of Minnesota, St. Paul, MN.
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Appendix B: Past Chicago Section Award Winners

B.4: Tanner Lectureship Awardees

- 2008 **Todd R. Klaenhammer**, Ph.D., Professor of Food Science, Microbiology and Genetics, North Carolina State University, Raleigh, NC.
- 2009 **Larry R. Beuchat**, Ph.D., Professor, Center for Food Safety, University of Georgia, Griffin, GA.
- 2010 **Steven J. Schwartz**, Ph.D., Professor of Food Science & Technology, Ohio State University, Columbus, OH.
- 2011 **Gary R. List**, ScD., G.R. List Consulting, President, Washington, IL.
- 2012 **Richard W. Hartel**, Ph.D., Professor of Food Engineering, University of Wisconsin, Madison, WI.
- 2013 **Connie Weaver**, Ph.D., Distinguished Professor and Department Head, Nutrition Science, Purdue University, West Lafayette, IN
- 2014 **John W. Erdman, Jr., Ph.D.**, Professor Emeritus, Department of Food Science and Human Nutrition University of Illinois at Urbana, Champaign, IL
- 2015 **Gary Reineccius, Ph.D.**, Professor and past Department Head in the Department of Food Science and Nutrition at the University of Minnesota, Minneapolis, MN.
- 2016 **Peter Schieberle, Ph.D.**, Professor at the Technical University of Munich and Chair for Food Chemistry in the Chemistry Department. Director of the German Research Center for Chemistry and Director of the Hans-Dieter-Belitz Institute for Cereal and Protein Research. Munich, Germany.
- 2017 **Steven Taylor, Ph.D.**, Professor and Co-Director, Food Allergy Research and Resource Program, University of Nebraska.
- 2018 **Purnendu C. Vasavada, Ph. D.** Professor Emeritus at the University of Wisconsin-River Falls. Food Science and Dairy Manufacturing.
- 2019 **Dennis R. Heldman, Ph.D.** Dale A. Seiberling Endowed Professor of Food Engineering. The Ohio State University
- 2020 **John W. Spink, PhD**, Assistant Professor. Michigan State University

Appendix B: Past Chicago Section Award Winners

B.5: New Member Awardees

B.5: New Member Awardees

Each year the Chicago Section IFT recognizes 1-2 new members for extraordinary volunteer service with the first five years (i.e., 5-years or less) of their membership with the Chicago Section – IFT.

PURPOSE: To recognize and encourage volunteer contributions by new members

ELIGIBILITY: Chicago Section Members only, excluding jury and elected officers for the year.

AWARD: The Award will consist of a voucher to attend a dinner meeting of choice as well as the dinner meeting to receive the award (December “Holiday” meeting). A physical plaque shall be presented as well as online recognition.

Deadline for receipt of nomination to the immediate past Chair will not be later than September 30

Award Language:

Chicago Section of the Institute of Food Technologists Excellence in Volunteer Service Award

In recognition of extraordinary service given to the Chicago Section IFT by a new member.

AWARDEES

2017-18: Courtney Hayes & Upasana Hariram

2018-19: Nicole Chmielewski & James Nasella

2019-20: Hitesh Moryani

Appendix B: Past Chicago Section Award Winners

B.6: Memorial Awardees

B.6: Memorial Award

A *memorial award* for CSIFT Members who have passed away during or after extended and extraordinary service to the Chicago Section IFT.

PURPOSE: To recognize extraordinary service posthumously

ELIGIBILITY: Chicago Section Members. Nominated by any member in good standing of the CS IFT.

AWARD: The Award will consist of a virtual plaque on the CSIFT Webpage that includes the names, lifespan and date of election of those CSIFT members selected for the award. A physical plaque or stone memorial engraved with name, lifespan and date of election shall be awarded to the family of the member

Website Award Language:

IN GRATEFUL RECOGNITION

To These Here-Noted Members of the Chicago Section of the Institute of Technologists, for their extraordinary service and contributions made to the Section and to the fields of Food Science and Technology

Atque in perpetuum...ave, atque vale!
Forever more, hail and farewell
--- Gaius Valervus Catullus

Physical Award Language

Chicago Section IFT Memorial Award IN GRATEFUL RECOGNITION

<<NAME>>

For their extraordinary service and contributions made to the Section and to the fields of Food Science and Technology

AWARDEES:

2017: Susan Monckton (April 5, 1952-March 20, 2014)

Dean Duxbury (1934-Oct. 9, 2016)

F. Glenn Connick (1927-June 20, 2013)

Gerald Bard (Oct. 7, 1932-Nov. 20, 2016)

2018: Olivia Fisher (1986-2017)

Appendix C: Speaker Submission Form

We are pleased to have you speak at an event hosted by the Chicago Section IFT. In order to ensure that we meet your needs as a speaker and that we can market the event, please provide the following information.

Return this form to BusinessOffice@ChicagoIFT.org no later than 60 days prior to the event. For questions, call 630.916.4960.

Note: All presentations are shared after the event on our website, newsletter, and in the CSIFT Knowledge Center. In addition, all presentations are recorded and shared on YouTube and on the CSIFT website.

Please confirm the use of your presentation.

- | | |
|---|---|
| <input type="checkbox"/> Presentation can be shared | <input type="checkbox"/> Do not share presentation |
| <input type="checkbox"/> Presentation can be posted* | <input type="checkbox"/> Do not post presentation |
| <input type="checkbox"/> Presentation can be recorded | <input type="checkbox"/> Do not record presentation |

*we would like to post your presentation topic/ summary on social media to spark discussion and interest in the meeting prior to the event/ dinner meeting. Will tag you in the post if you have that social platform. LinkedIn, Facebook, or Instagram.

You are scheduled to speak on **DATE**.

Schedule:

- 4:00-5:00 PM Executive Board Meeting. You are welcome to attend, but not required.
- 5:00-6:00 PM Social Hour. Please plan on arriving no later than 5:15 PM.
- 6:00-7:00 PM Dinner
- 7:00-8:00 PM Your Presentation Time. Plan at least 15 minutes for questions.

Speaker name (As you'd like it to appear on your name badge and in the marketing. Include title and company name.):

Title of Presentation:

100-300 words summarizing presentation:

Bio & Photo (1 page or less):

Type of presentation. Choose what best applies:

- Lecture Panel Discussion Demonstration Other (please describe)

Special requirements?

- Internet Audio / Sound Other (please describe)

Appendix C: Speaker Form

Travel

Will you need to secure airfare, hotel, and/or road transportation? If so, please arrange with the Program Chair.

- Airfare Hotel Car / Limo / Taxi

Important Dates / Information

- ↻ 5 days prior to meeting (Thursday 5 PM) email your presentation to BusinessOffice@ChicagofIT.org. It will be uploaded to the CSIFT laptop and ready for you to preview when you arrive (or by 5:30 PM).
- ↻ 5 days prior to the meeting email BusinessOffice@ChicagofIT.org if you have special dietary restrictions (meal choices will be provided and your dinner is included).

If you have any other questions or needs do not hesitate to contact our office.

I agree to speak at the Chicago Section IFT event noted on this agreement under the terms referenced.

Signature of Speaker

Date

Name of Speaker

Appendix C: Speaker Form
