

# ICSB Affiliate Handbook

The ICSB Affiliate Handbook intends to have basic information as to important aspects of running an ICSB Affiliate including the types of linkages amongst affiliates and the International Office and Affiliates and the Board. The handbook could also serve as a vehicle for Affiliates sharing how they are dealing with common issues such as increasing and retaining members, fundraising, affiliate development, and member benefits.

## Table of Contents

Status of an Affiliate

Affiliate Office

- Site
- Role
- Resources

Communication with the ICSB International Office

- Membership count
- Quarterly Affiliate Invoices
- ICSB Bulletin
- Journal of Small Business Management (JSBM)
- Membership Directory

Communication with the ICSB Board

- Affiliate Presidents Reports
- Hosting ICSB Board and Officers' Meetings

Communications within the Affiliate

Membership Benefits

Affiliate Development

Financial considerations within an Affiliate

## **Status of an Affiliate**

The approval for an entity to be granted ICSB Affiliate status is determined by the ICSB Board of Directors upon review of the documentation that is required for this purpose. Such documents include Affiliate bylaws. As Affiliate bylaws are modified over time, the revised bylaws need to be sent to the International Office right after they have been modified and approved.

To be granted and to maintain the status of an ICSB Affiliate, a set of minimum conditions must be met by the Affiliate. These include: 1) consistent membership count of at least 50 members, 2) the payment of quarterly dues within 30 days of the statement being received by the Affiliate from the International Office. Should an Affiliate fall four quarters behind in payment of dues, all benefits from the International Office will be halted and the Board ultimately may revoke Affiliate status. Also, should an Affiliate's member count consistently fall below 50, the Board may reconsider Affiliate status.

Affiliates have their own Board of Directors, elected by their membership, in accordance with their bylaws. According to the ICSB bylaws, the ICSB President designates an ICSB officer (who is also a member of the ICSB Board of Directors), as an ex-officio member of the Board of Directors of each Affiliate.

## **Affiliate Office**

### **Site**

An Affiliate office site should be chosen by the affiliate. Some affiliates have had few changes of site over the years, while others change sites quite often. Experience has shown it is to everyone's advantage that an Affiliate office site be selected with permanency in mind. Moving location frequently can be unproductive. Permanence of location adds stability and assists Affiliate growth.

### **Role**

The role of the Affiliate office is to serve as communications link with Affiliate members and the Affiliate Board of Directors as well as with the ICSB International Office. Such communication includes receiving Bulletins, Journals, Membership Directories, Call for Papers, Brochures of the Annual ICSB World Conference and forwarding them to Affiliate members. Given that ICSB carries out its communications in English, the Affiliate Office should have someone (or access to someone) that can communicate effectively in the English language. The Affiliate office, by some Affiliates referred to as the Secretariat, handles all the "paperwork" as related to the Affiliate. This includes: mailings for call for nominations for the Affiliate Board of Directors, mailings (and receipt) of the ballots for elections of the Affiliate Board of Directors, and minutes of the meeting of the Affiliate's Board.

The Affiliate office receives the quarterly Affiliate invoices from the International Office and follows up with the Affiliate's internal method of processing to ensure that invoices are paid up when due (see section "Quarterly Affiliate Invoices").

## Resources

It is recommended that an Affiliate Office should have the following:

- fax machine (preferably a dedicated line)
- computer (Windows is recommended and Microsoft Office)
- email capability
- ability to handle regular mailings to their membership
- access to photocopy facilities
- \*checking account to handle payments
- \*services of an accountant to file appropriate reports (ie. tax reports) and audit books

\*Note: some Affiliates have some or all of this handled by their finance officer (i.e. "Vice President for Finance", "Secretary/Treasurer", or similar position) who might change from year to year and might be located in a separate location.

## Communications with the ICSB International Office

Perhaps the most important responsibility of an Affiliate office vis a vis its status as an Affiliate is to maintain ongoing communication with the ICSB International Office. The International Office serves ICSB's Affiliates, Board of Directors, and members. In order to serve these various constituencies, the International Office must be kept updated on the current status of affairs at the Affiliate level.

## Affiliate Member Count

It is important for Affiliates to keep an up-to-date count of their membership and to supply this information to the International Office upon request. Affiliates must be responsive when member counts are requested from the Affiliate offices on a quarterly basis. They are used to determine the quantity of *Bulletins* to ship. In the event that no count is sent, the International Office will use the most recent number on record. Dues to be paid to ICSB International Office are based on these counts.

Affiliates that in their geographic coverage have "DC members" (Developing Countries- DC members were formerly known as LDC members- Less Developed Countries) should divide their count into regular and DC members. If an Affiliate has DC members, the count should be reported as follows:

|         |           |
|---------|-----------|
| Regular | 60        |
| DC      | <u>10</u> |
| Total   | 70        |

Fees for Affiliate members are determined by each Affiliate (see the section "Financial considerations within an Affiliate"). Regardless of the amount charged by Affiliates to their members, the ICSB International Office bills the Affiliate based on the membership count of the Affiliate at a rate determined by the ICSB Board, thus Affiliates need to consider what the fee to the ICSB is for each member at the time they initially set or when they revise their membership dues. Currently ICSB charges Affiliates for regular members (be they individual or organizational members) the rate of \$6.25/quarter--\$25/year. As DC members pay less dues to their Affiliate and receive less benefits, the Affiliate is charged less by the International Office for them than for regular members. Currently ICSB charges Affiliates for DC members the rate of \$1.00/quarter--\$4/year.

The *Journal of Small Business Management* may also request a member count for shipment of the *JSBM*.

At any time an Affiliate member count changes significantly, the International Office and the *JSBM* Office should be notified immediately.

### Quarterly Affiliate Invoices

Quarterly invoices are sent out to Affiliates (via Affiliate office of record) within a month of the quarter's end. The schedule is as follows:

| <u>Quarter</u> | <u>Time Covered</u> | <u>Affiliate Billed</u> | <u>Affiliate Pays</u> |
|----------------|---------------------|-------------------------|-----------------------|
| 1st Quarter    | July - September    | October                 | November              |
| 2nd Quarter    | October - December  | January                 | February              |
| 3rd Quarter    | January - March     | April                   | May                   |
| 4th Quarter    | April - June        | July                    | August                |

The membership count used for the quarterly invoice is the number supplied by the Affiliate to determine the quantity of *Bulletins* shipped during that quarter. Thus, at the time an Affiliate receives the invoice, their member count may vary from the number for which they are being charged.

The shipping costs of the Bulletin and the Journal are also included in the quarterly invoices.

The International Office notifies the SVP Affiliates when an Affiliate is at least one quarter behind in payments. The SVP Affiliates follows up with the respective Affiliate President (as agreed June 7, 2000 at the Board of Director's meeting).

As stated previously, should an Affiliate fall four quarters behind in payment of their dues, all benefits from the International Office will be halted and the Board may revoke Affiliate status. Also should an Affiliate's member count fall below 50, the Board may revoke Affiliate status.

If possible, though not essential nor required, it is recommended that Affiliates consider setting up a financial year that corresponds to the ICSB year (July to June) to minimize confusion. It is further recommended that an Affiliate have membership begin at the start of each quarter in order to provide a more uniform method of keeping track of membership renewal notices and other transactions with the members of the Affiliate.

## **ICSB Bulletin**

The ICSB Bulletin is the official newsletter of the organization and is provided in electronic format sent from the ICSB website. Chapters may choose to print and ship this newsletter to their members. The Chapter incurs all costs associated with this process.

**HOW TO HAVE INFORMATION PUBLISHED:** One of the benefits for Chapters is to utilize the ICSB Bulletin to inform ICSB members worldwide about future conferences, to report on recent developments, publicize research opportunities, open up positions or advertise other activities that the Chapter is planning or has organized. Chapters are encouraged to send information for the ICSB Bulletin thru the International Office on a regular basis.

## **Journal of Small Business Management**

### **SHIPPING & BILLING**

Currently the Journal of Small Business Management (JSBM) is being shipped directly from the publisher to the Affiliate in bulk. The Affiliate then distributes it to their members. Shipping costs of the Journal are billed by the International Office to the respective affiliates together with the quarterly invoices.

### **HOW TO HAVE INFORMATION PUBLISHED**

ICSB members are encouraged to submit original research for possible publication in the Journal. For details please check the most recent edition of the Journal.

## **Web-based Membership Directory**

A key benefit to ICSB members is access to the global membership through the members-only accessible Membership Database. The information for the Database is an assemblage of individual Affiliate and Chapter databases (which includes Chapter Members) plus all international members organized under the International Office.

Affiliates and Chapters must maintain this information in a uniform format as specified by the International Office taking into account applicable laws regarding confidentiality of personal data. It must be updated on a regular basis and sent to the International

Office. The International Office will provide the guidelines as to what information is needed and when/how the information is to be provided for inclusion in the Membership Database.

## **Communications with the ICSB Board**

Affiliate Presidents are members of the ICSB Board of Directors and as such have voice and vote at the Board meetings. Other Affiliate officers are invited to attend ICSB Board meetings, but have no voice nor vote unless formally designated to represent the Affiliate President at a particular Board Meeting.

### **Affiliate President's Report**

To enhance the relationship and the communications among all parties, it is expected that Affiliate Presidents (or someone officially designated by the Affiliate for such purpose) be present at the meetings of the ICSB Board of Directors. For such meetings, Affiliate Presidents need to distribute an Affiliate report to all Board members prior to the meeting. The Affiliate President's Report should include: membership figures, information about the financial status of the Affiliate, Affiliate development, conferences hosted (or co-sponsored) by the Affiliate, improvement and/or development of membership benefits, problems/concerns/suggestions/opportunities of the Affiliate as well as matters for ICSB to consider.

To further enhance the communication links with Affiliates, the position of Senior Vice President- Affiliates was established in 1998. Affiliate Presidents are encouraged to communicate directly with the SVP Affiliates to inform about progress and status of the Affiliate or to request any assistance they might need.

### **Hosting ICSB Board and Officers' Meetings**

The ICSB Board of Directors is open to receiving invitations to hold Board meetings as well as Officers' meetings in conjunction with an Affiliate activity (see the section "Affiliate Development").

## **Communications within the Affiliate**

A frequent opportunity for the Affiliate President to communicate with Affiliate members is when the quarterly ICSB Bulletin and/or the Journal of Small Business Management is forwarded to each member. At such time a letter by the Affiliate President can make reference to the Bulletin, the Journal, a call for papers for an ICSB World Conference or for a conference by another ICSB Affiliate as well as to developments of interest to Affiliate members.

As Affiliates develop, some have established their own newsletter. Newsletters published and distributed by affiliates provide a forum for articles to communicate particular developments, updates of research activities, etc.

Various Affiliates have developed web pages as a means to readily communicate with members about upcoming activities. Web pages of all Affiliates should be linked to the ICSB web page ([www.icsb.org](http://www.icsb.org)). All of the communication channels mentioned can be used at a particular time to further enhance the ability of the Affiliate and its membership to communicate effectively.

Bylaws of the Affiliates often require formal communications which need to be undertaken. Such communications, which provide further opportunities to enhance communications within an Affiliate, include:

- request for nominations for Affiliate Board of Directors
- voting for the various positions of the Affiliate Board of Directors
- invitation to the Annual Membership Meeting
- voting for proposed changes in the Affiliate By Laws

A formal yearly communications opportunity is the Annual Membership Meeting.

### **Membership Benefits**

Members of an ICSB Affiliate are also members of ICSB and as such receive the following benefits (except for those listed as DC members): The ICSB Bulletin and the Journal of Small Business Management (JSBM), both on a quarterly basis; the ICSB Membership Directory, and reduced rates at the ICSB Annual World Conference as well as at conferences of ICSB Affiliates.

In addition to the ICSB member benefits listed above, an Affiliate is encouraged to develop more benefits as a way to attract new members, retain current members and enhance the role of the particular ICSB Affiliate in the region which it serves.

- Typical member benefits provided by an ICSB Affiliate include:
  - Development and/or sponsorship of conferences, seminars and other types of forums consistent with the mission of furthering entrepreneurship.
  - Proceedings of conferences, copies of research reports, etc. consistent with the mission of ICSB.
  - Development and distribution of an Affiliate newsletter (by post and/or by e-mail).
  - Website

- Some Affiliates have (or have had at a particular time) published, co-published or sponsored a specific Journal for the benefit of their members.
- Affiliate Membership Directory.

### **Affiliate Development**

Most affiliates organize seminars, annual conferences, workshops, etc. as a three way strategy: to provide a benefit to members (who attend the conference at a reduced rate while providing them with a forum to make presentations and to network); to increase its membership base (as those in attendance who are not yet Affiliate members get included in their registration fees with a one year membership); and to obtain additional funding (as such activities provide the opportunity to obtain sponsorship resources that can help fund the Affiliate).

As part of the ICSB policy to be of assistance to Affiliates and its members, the ICSB Board of Directors is open to receiving invitations to hold Board meetings as well as Officers' meetings in conjunction with an Affiliate activity. There is no requirement for the Affiliate to cover expenses related to Board members travel, accommodations, meals, nor conference fee for the Board members who take part in the Affiliate's activity. The Affiliate does provide logistical support in making arrangements to hold a Board/Officers' meeting. Some Affiliates have invited the ICSB Board to hold meetings before or after an Affiliate's major event (such as their Annual Conference) and thus attract key Board members from different parts of the world to take part in the Affiliate's activity as panel members, discussants, session chairs, and keynote speakers, at no cost to the Affiliate. Some Affiliates have waived conference registration fees for the ICSB Board members who take part in the program of the Affiliate activity and/or taken over the cost of providing lunch and coffee for the Board meetings. Participation of ICSB Board members in Affiliate activities generally has proven to be instrumental to help position an Affiliate as part of a unique international network of individuals and entities committed to advancing entrepreneurship.

### **Financial Considerations within an Affiliate**

For new Affiliates the majority of income normally comes from membership fees charged to individuals as well as organizations. Likewise, the majority of the Affiliate expenses are related to membership dues, the cost of shipping Bulletins and Journals that the Affiliate pays to the International Office on a quarterly basis.

Membership fees for Affiliate members are determined by each Affiliate. These usually are billed annually to Affiliate members and collected in a lump sum. Affiliates in turn pay quarterly to the International Office (based on the membership count of the Affiliate) at a rate determined by the ICSB Board; thus, Affiliates need to consider what the fee to

the ICSB is for each member at the time they set their membership dues. Currently ICSB charges for regular members (be they individual or organizational members) the rate of \$6.25/quarter--\$25/year. As DC members pay less dues to their Affiliate and receive fewer benefits, the Affiliate is charged less by the International Office for them than for regular members. DC members are charged at the rate of \$1.00/quarter--\$4/year. Affiliates charge their members in their local currency (in most cases not US dollars) and need to pay the ICSB International Office in US dollars. Fluctuations in the currency exchange rates can have a beneficial or a detrimental effect on the finances of the Affiliate and thus need to be considered at the time Affiliates determine what to charge their members and as they prepare and revise their Affiliate budget. Problems with paying ICSB dues owed to the International Office arising from significant currency fluctuations in an Affiliate should be brought up by the Affiliate President to the ICSB President.

Affiliate expenses, in the majority of the Affiliates, are:

1. Dues to International Office;
2. Postage for receiving the Bulletins and Journals and postage and other expenses related to doing mailings to Affiliate members
3. Costs related to the Affiliate Office (even when this is provided as an in kind contribution there are telephone expenses, printing charges, etc.)

Experience shows that Affiliates need to develop additional sources of revenue in order to grow and provide meaningful benefits to their membership. The "Affiliate Development" section above explains the benefit Affiliates might reap from hosting conferences, seminars, and workshops that provide the opportunity to solicit and obtain additional sponsorships.

Several Affiliates have experienced significant financial rewards, as well as affiliate development and growth, by hosting the Annual ICSB World Conference. An ICSB Affiliate can propose to the ICSB Board to host a World Conference by responding to the request for proposals that the SVP Programs send to Affiliate Presidents annually.