

# CHAPTER MANAGEMENT MANUAL

**CULTIVATING AND  
SUPPORTING THE  
ADVANCEMENT  
AND RECOGNITION  
OF WOMEN IN  
ALL ASPECTS  
OF NATIONAL  
SECURITY.**



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### **WID Mission**

To cultivate and support the advancement and recognition of women in all aspects of national security.

### **WID Vision**

Women In Defense provides women a formal environment for professional growth through networking, education, and career development.

Please refer to the WID website—<http://wid.ndia.org>—for the most recent list of the National Board of Directors and chapters, membership application, WID history, and national bylaws.

Sprinkled throughout this manual are areas where chapter leaders can record information about their chapter, thus making this the basis for your chapter operations manual.

## Introduction

March 2015

Dear Chapter Leaders:

The Chapter Management Manual provides guidance from the Women In Defense National Organization to chapter leaders for managing their organizations. This is the “go to” source for your chapter operations.

This manual should be the basis for your chapter operations manual, so there is space to record unique information. By passing it to successive chapter boards, you help assure continuity of your organization. You are encouraged to add a section for procedures and practices unique to your chapter.

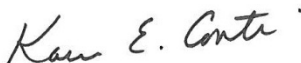
Please refer to the WID website—<http://wid.ndia.org>—for the most recent

- National Board of Directors
- National Bylaws
- Chapters
- WID history

Professional staff can help you with many aspects of managing your chapter. WID Acting Director Sullivan and Executive Director Barbara Dunlavey have many years experience with non-profit organizations and chapters. Trina Dickey is available for administrative support. She provides your membership lists, conveys website updates, and more. Other NDIA staff members have a tremendous range of expertise you can consult. Plus, WID National Vice President Amy Courter is liaison with chapters.

Our current chapter structure began in 2001. Chapters are largely responsible for the dramatic growth of our organization. With the partnership of chapters and the National organization, we assure a diverse national security workforce of people who have more knowledge, leadership skills, and connections and are better equipped to serve the nation.

Sincerely,



Karen Conti  
WID National President  
2013-2015



Barbara Dunlavey  
Executive Director

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### Points of Contact

#### WID National Board

President: Karen Conti  
[karen.conti@raytheon.com](mailto:karen.conti@raytheon.com)  
(401) 842-4575

Vice President: Amy Courter  
[courtera@earthlink.net](mailto:courtera@earthlink.net)  
(586) 246-3940

#### Staff

Executive Director: Barbara Dunlavey  
[bdunlavey@ndia.org](mailto:bdunlavey@ndia.org)  
(703) 247-2551

Administrative Support: Trina Dickey  
[tdickey@ndia.org](mailto:tdickey@ndia.org)  
(703) 247-2589

## Leadership

Chapter leaders often hear representatives of WID National talk about “the big four”—leadership, membership, programs, and finances. Arching over “the big four” is mission. The board of directors is the key to a chapter’s mission execution. To cultivate and support the advancement and recognition of women in all aspects of national security is the mission of Women In Defense.

The board of directors has the main governance responsibility. Governance is the participation of volunteers in making decisions crucial to the viability of an organization. Bylaws describe governance structure and how power is allocated. Boards have important duties. For example, they should ask timely and important questions and participate in discussions in good faith. They should be knowledgeable about the bylaws of the chapter and the National organization. The board should act as a body, not speaking as individual board members, and monitor results against goals.

Mission is paramount in operating a chapter, and the board is responsible for carrying out the mission. Boards define the mission, establish goals, and decide how to create programs to meet member needs. Chapter leaders are charged with interpreting the WID mission in a local, geographical way. Leaders determine each chapter’s unique personality, and your community drives much of what you do. Are you located near a military installation? Are most of your members from industry? Does the ratio of large to small businesses make a difference? Is your area growing or is it in transition?

Carrying out the mission takes teamwork and the talents of multiple individuals. Business executives, who make up a large part of the chapter leadership across the nation, know the value of delegation. Therefore, they turn to team members to be responsible for chapter activities.

While board membership brings many responsibilities, WID has an advantage. As an affiliate of NDIA, WID is similar to a subsidiary of a corporation. The NDIA relationship frees us from many business responsibilities so we can concentrate on executing the mission. We can devote our time and energy to developing our membership base and delivering relevant programs to meet member needs.

While trying to meet many responsibilities in addition to the chapter—our “day job,” families, and more—it can be difficult to think beyond urgent things, like getting ready for the next luncheon. To take a chapter to the next level, boards have to visualize how it will look next year or further or even under the next board. How can the organization make a difference in the careers of members? What differentiates the chapter from other organizations in your area or field? Think strategically about chapter value.

Reference: Henry L. Ernstthal, CAE. *Principles of Association Management*, 4<sup>th</sup> edition. Washington, DC: American Society of Association Executives, 2001.

## **Roles and Responsibilities**

The mission of WID is to cultivate and support the advancement and recognition of women in all aspects of national security and defense environments. To achieve this mission, WID is structured and operates in accordance with its National and Chapter Bylaws and NDIA articles of incorporation and bylaws. The roles and responsibilities of the National Board and of Chapter leaders follow.

### **National Board**

The role of the National Board is to facilitate the growth of the organization, to provide infrastructure and support, and to develop chapters. The National Board provides overarching policies and procedures and maintains the fiduciary and legal responsibility for the organization. The National Board is comprised of those positions and members as established in the National Bylaws. The National Board has responsibility for the chapters. Chapters derive their existence and legitimacy from the National organization. National focuses on large-scale issues and activities and works on behalf of all members.

The National Board is responsible for marketing WID, maintaining communications vehicles, fostering professional development, and holding an annual membership meeting and training for chapter leaders. Member dues are used to grow and sustain the organization, including supporting the necessary infrastructure. The Board is also responsible for developing leadership succession to assure continuity.

The National Board has overall responsibility for administrative functions and delegates the execution of those responsibilities as needed. These include providing member services, maintaining the membership database, and providing materials and other organization items.

### **Chapter Leaders**

Chapters are the face of the association and the direct link to WID members. Chapters are organized geographically for the purpose of encouraging local activities that support the organization's vision, mission, and goals.

Chapters will provide opportunities consistent with the WID mission and vision that interest and benefit chapter members. Such activities may include: professional development/educational events and programs, opportunities to exchange ideas and experiences, opportunities for community outreach, and networking with government and industry colleagues. Each chapter must focus on the interests of its members, their preference for types of activities, and the availability of appropriate resources, such as speakers.

Chapters are responsible for highlighting national security topics. Chapter programs must cover expenses and be self-sustaining.

### **Affiliate Relationship**

Women In Defense is an affiliate of NDIA. The relationship is comparable to a company's subsidiary. The WID National Board has autonomy to set the course for the organization, develop and execute programs, and manage its funds.

Revised WID National Board of Directors  
December 2014

## Membership and Chapters

### Membership

Membership in WID is open to professional women and men whose primary professional activities relate to national security. Members are typically from defense companies and other businesses, both small and large; all branches of the U.S. Armed Forces, plus federal government agencies; and academia, associations, and professional services. Membership in WID includes NDIA membership.

All active duty military and government employees are eligible for complimentary one-year membership. There are no corporate memberships.

### Membership Dues

- Annual (one year)—\$40
- Lifetime—\$500
- Government & military (one year)—Complimentary; after the first year, annual membership dues are \$40.

### Recruitment and Retention

A key responsibility of Chapters is to promote membership. A membership brochure with application is available from National. You can also point prospects to the website to join.

Please do not overlook the vital aspect of retention. During the first year of your chapter's existence, it can be easy to attract members to something new. But making sure people renew is the key to keeping your organization thriving. Find a member who enjoys talking with people and invite her to make calls or visits to members who have not renewed, for example. Keep renewal in mind when you plan your activities. Rarely do happy members drop their membership.

### Member Data, Membership Card

Each month, WID administrative support sends your chapter membership contact a membership list. If you learn of changes in a member's data, ask the member to make the change by accessing [www.ndia.org/Login](http://www.ndia.org/Login) and locate the section for updating member profiles. Changes should be made only by the member herself—**not** by a representative of the chapter. It is proprietary information left to the member herself to use.

To view your membership card: Log in at [www.ndia.org/login](http://www.ndia.org/login). You will be asked for your e-mail address and password. (Follow the prompts if you do not know your password.) Click "login." On the next screen, on the left side, click "View Memberships." On the next screen, under "My Membership Information," click "Download Membership Card." The new card shows all your memberships (NDIA and Affiliates) and all your chapters (NDIA and WID).

### Chapters

Members are assigned to a chapter based on their zip codes. A member may request a chapter other than the one assigned automatically. For a list of chapter zip code parameters, contact Trina Dickey.

In general, WID chapter boundaries follow those of NDIA chapters. A WID member is automatically a member of NDIA, and that includes membership in a chapter of NDIA. The NDIA and WID websites list chapters of both.

Individuals not in a chapter geographic area remain as members unassigned.

The zip codes that define our chapter are:

### Financial Responsibility

The National organization expects a chapter to be financially healthy and to maintain sound finances. That includes budgeting for programs, general funds, revenue and expenses. Chapter events (meetings, outings, etc.) are expected to generate at least enough revenue to cover expenses. Plan a one- two-year program to provide for chapter growth. Then create a budget to fund those programs.

A member/non-member price must be charged at your events. The purpose of this is to underscore for members the value of their relationship with WID.

Chapters scheduling activities with large financial obligations should make certain those obligations do not exceed the chapter's financial reserves unless prior arrangements have been made with WID National. If a chapter is unable to pay a financial obligation, the National organization is held liable, and ultimately, NDIA. Therefore, a careful and realistic financial operating program is crucial for chapter leaders and expected by the WID National Board of Directors.

### Annual Financial Audits

Chapters need to have a financial audit performed annually, consistent with the extent of its financial activity and to ensure sound financial controls. The financial records of the chapter shall be kept in a manner generally deemed acceptable for such organizations and shall be audited by independent auditors, a certified public accountant, or an impartial audit committee at least annually at the end of the fiscal year. The president will appoint from within the chapter membership at least three persons to serve on the audit committee as approved by the board of directors.

Chapter financial reports are compiled and included with the WID National financials. NDIA incorporates this information into the overall corporate tax filing to the Internal Revenue Service.

In connection with their annual reporting to National, WID chapters must have a financial audit. What is the source of the requirement for a financial audit? NDIA bylaws, Article VIII state: "The accounts of the Association (meaning NDIA and Affiliates) shall be audited annually by an independent auditor, who is a Certified Public Accountant."

WID chapter financial statement data is summarized and reviewed by the NDIA audit firm and included in IRS Form 990 for annual federal tax reporting of the corporation (NDIA and Affiliates).

The objectives of the audit are:

1. to gain reasonable assurance that the financial statements are presented fairly in all material respects and give a true and fair view in accordance with the financial reporting framework
2. to assess the adequacy of financial controls.

Preparation of the financial statement is the responsibility of the organization's "management;" it is signed by the chapter president and treasurer.



Technically, what NDIA requires is not an “audit” because it does not demand as much complexity. The audits for WID chapters review assets and assess financial controls. For example, does the chapter have a process for issuing checks? Number of signatures required? Reconciling bank account statements and keeping the checkbook balanced? Prompt payment of invoices?

Three types of audits are recommended, and leaders of a chapter may choose the one that makes sense relative to the complexity of their chapter. The options are:

1. an independent auditor—This is certainly an option; there are many small, private audit firms. Tailor to the organization and its financial complexity. Using an independent auditor makes more sense if the chapter has an investment portfolio than if the chapter simply has a checking account.
2. a Certified Public Accountant—It might be possible to find someone to perform the audit *pro bono*. In most cases, the cost of a CPA for a full audit would not only be unnecessary because of the simplicity of our chapters, but also cost prohibitive.
3. an impartial audit committee—Some chapters tap members with some finance/accounting background who are somewhat familiar with chapter operations but not serving on the board.

### Frequently-Asked Questions

#### Do we report “gifts in kind” and services we receive as a chapter?

Usually not. For example, if one of your members sets up an event for the chapter, those “volunteer services” are not recognized on your financial statement per general non-profit practice. However, if an attorney or a CPA performs certain services, such as legal or auditing services, you would obtain the cost of the service (based on a sample invoice) and show it both as income and as an expense.

#### What about silent auctions when we receive goods we auction off?

To avoid complexity, use the gift quickly and in the same fiscal year. If you don’t use the gift in the same fiscal year, you first have to recognize it in your financial statement with an estimated value and then adjust for the actual sale price in the subsequent fiscal year.

#### What if we pass along dues payments?

If you are just acting as an intermediary, the “courier,” so to speak, and sending the dues to National on behalf of a member, there is no need to record the revenue. Don’t cash the check; just mail it to National. If you do cash the check, then you have to record it as revenue and a subsequent disbursement when you write the check to National. If someone gives you cash, record it as revenue. Best approach: Head off the member by asking her to write the check payable to WID, not to the WID XYZ Chapter.

#### Should we have a standing audit committee?

If you think it would be useful for your chapter, then yes. There are many advantages in having a greater number of members involved in your chapter’s financial health. You might recruit someone with a background in finance or accounting, not necessarily a CPA. A sample audit committee charter is available.

For questions about your audit, please contact NDIA COO Terri Swetnam, [tswetnam@ndia.org](mailto:tswetnam@ndia.org) or (703) 247-2548 or WID Executive Director Barbara Dunlavey.

## **Sponsorships**

Chapters are encouraged to find sponsors, which typically come from the corporate base in your area. These might be for Chapter support in general or for specific events.

## **Required Reports**

A sample report is included in this manual for illustration. Report forms will be sent to Chapter Presidents or Treasurers near the end of the fiscal year. Return deadline is October 7.

1. Financial report: summarizes revenue, expenses, and the asset position for the fiscal year
2. Leadership report: Lists officers and directors
3. Program report: Lists the activities for the year with number of attendees broken down by government/military and industry attendees
4. STEM report: Describes programs directed toward supporting education in science, technology, engineering, and mathematics (STEM)
5. Scholarship report: Lists number of scholarships given and amount awarded; whether the chapter's activity was a donation to another organization or given in its own program
6. Social media report

## **Record Keeping**

A record retention schedule follows. So you can complete the reports listed above and keep your chapter's history, we suggest you develop a system to track the following:

- Revenue and expenses. Typical chapter revenue sources include but are not limited to registration fees for events you conduct (for example, breakfasts, luncheons, dinners, receptions, golf outings), sponsorships (money given by a company to help you pursue your mission and programs), donations, and interest and dividends. Typical expenses include but are not limited to chapter business-related travel, meals, and lodging, communications (postage, printing, copying, faxing), office supplies, awards, gifts to recognize service or speakers, membership in local organizations (Chamber of Commerce, for example), website maintenance fees, bank fees.
- Attendance at your programs and events, including:
  - Name of event
  - Date
  - Number of attendees from government/military
  - Number of attendees from industry
  - Total
- Minutes. The board secretary should keep a minutes book. Minutes should reflect discussions held and actions/items approved in accordance with governance requirements. Keep both paper and electronic versions. See *Robert's Rules of Order* for information about minutes.
- Lists of your board members, committee members, and other volunteers and leaders (perhaps class photos)
- Charter members (perhaps a photo)

## NDIA Record Retention Schedule

### *Retention Period*

Accident reports/claims (settled cases) .....	7 years	Event general correspondence .....	Event FY plus 2
Accounts payable ledgers and schedules .....	7 years	Minute books of directors, stockholders, bylaws and charter .....	Permanently
Accounts receivable ledgers and schedules .....	7 years	Notes receivable ledgers and schedules .....	7 years
Audit reports .....	Permanently	Option records (expired) .....	7 years
Bank reconciliations .....	3 years	Patents and related papers .....	Permanently
Bank statements .....	3 years	Payroll records and summaries .....	7 years
Cash books .....	Permanently	Personnel files (terminated) .....	7 years
Chart of accounts .....	Permanently	Petty cash vouchers .....	3 years
Checks (canceled-see exception below) .....	3 years	Physical inventory tags .....	3 years
Checks (canceled for important payments, i.e., taxes, purchases of property, special contracts, etc. Checks should be filed with the papers pertaining to the under- lying transaction) .....	Permanently	Plant cost ledgers .....	7 years
Contracts, mortgages, notes and leases (expired) .....	7 years	Property appraisals by outside appraisers.....	Permanently
(still in effect) .....	Permanently	Property records, including costs, depreci- ation reserves, year-end trial balances, depreciation schedules, blueprints, and plans .....	Permanently
Correspondences (general) .....	2 years	Purchase orders (except purchasing department copy) .....	1 year
Correspondence (legal and important matters only) .....	Permanently	Purchase orders (purchasing department copy) .....	7 years
Correspondence (routine) with customers and/or vendors .....	2 years	Receiving sheets .....	1 year
Deeds, mortgages and bills of sale .....	Permanently	Retirement and pension records .....	Permanently
Depreciation schedule .....	Permanently	Requisitions .....	1 year
Duplicate deposits slips .....	2 years	Sales commission reports .....	3 years
Employment applications .....	3 years	Sales records .....	7 years
Expense analyses/expense distribution schedules .....	7 years	Scrap and salvage records (inventories, sales, etc.) .....	7 years
Financial statements (year-end, other optional) .....	Permanently	Stenographers' notebooks .....	1 year
Garnishments .....	7 years	Stock and bond certificates (canceled) .....	7 years
General/private ledgers, year-end trial balance .....	Permanently	Stockroom withdrawal forms .....	1 year
Insurance policies (expired) .....	3 years	Subsidiary ledgers .....	7 years
Insurance records, current accident reports, claims, policies, etc. ....	Permanently	Tax returns and worksheets, revenue agents' reports and other documents relating to determination of income tax liability .....	Permanently
Internal audit reports (longer retention periods may be desirable) .....	3 years	Time books/cards/software files .....	7 years
Internal reports (miscellaneous) .....	3 years	Trademark registrations and copyrights .....	Permanently
Inventories of products, materials and supplies .....	7 years	Training manuals .....	Permanently
Invoices (to customers, from vendors) .....	7 years	Union agreements .....	Permanently
Journals .....	Permanently	Voucher register and schedules .....	7 years
Magnetic tape and tape cards .....	1 year	Vouchers for payments to vendors, employees, etc. (includes allowances and reimbursement of employees, officers, etc. for travel and entertain- ment expenses) .....	7 years
Event Registration, Exhibitor Contracts .....	Event FY plus 4	Withholding tax statements .....	7 years
Event Hotel/Conv Center Contracts .....	Event FY plus 2 (if claims situation or something unusual see VP Business Operations)		(as of January 20, 2010)

## **Liability Insurance Coverage**

Chapters of WID are an integral part of the WID national organization, and WID is an integral part of NDIA. Thus, all elements are covered by the insurance policies held by NDIA.

Association Professional Liability Insurance (Directors & Officers). Defends the association and its chapters against suits brought against the association and chapter officers for actions undertaken in performance of duties (\$1 million).

General Liability. Provides general coverage for a variety of commercial business risks, such as damage to other party's property due to insured's negligence, and bodily/personal injury for persons who are volunteer workers while they are acting at the direction of, or within the scope of their duties within the association. Also provides for bodily injury and property damage that we may be obligated to pay as a result of the association or its chapters sponsoring or hosting conventions, symposia or exhibits. It is important to note that any liability arising from the

ownership, operation, maintenance use or entrustment to others of any aircraft, automobiles, mechanical amusement devices, or watercraft is specially excluded from liability coverage. (\$2 million general aggregate and products, \$1 million each occurrence and personal and advertising injury, \$300,000 fire and \$10,000 any one-person medical expenses)

## **Branding; Use of WID Logo & Member Lists**

To ensure the integrity of WID, use of the logo and membership lists is authorized only by employees of NDIA and selected chapter officers conducting official business under the name of the Association. The logo and lists **are not** to be used or solicited in the promotion of events, publications, or other activities that are not related to WID or NDIA. Neither WID nor NDIA sell or rent distribution lists, including e-mail addresses.

## **Relationship to NDIA, WID**

A chapter of WID is an integral part of Women In Defense, which in turn is an integral part of the National Defense Industrial Association. Because of the WID relationship to NDIA, your chapter does not need to make separate provisions for several important functions:

- no separate federal identification number (employer identification number)—the number for NDIA is to be used for all financial and event information and will be sent to you
- no separate insurance (chapters might need a special insurance for certain events)—WID and its chapters are covered under NDIA risk management programs
- no separate incorporation—WID and chapters are covered under the NDIA incorporation
- no separate tax exemption ruling—WID and chapters fall under the NDIA federal tax exemption as a 501(c)3 organization, and you will be sent appropriate documentation.

In certain instances, a military installation has special requirements for hosting events at the installation.

## **Disestablishment**

If a chapter must be disestablished (dissolved), any funds or other assets remaining after payment of all obligations shall be distributed to WID National.

**Business Documents**

Chapters must have a checking account in order to do business. To establish a bank account, you will need to prove you are a legitimate entity. The staff director will equip you with a letter of introduction, a copy of the NDIA tax exemption letter, and the NDIA federal identification number.

Financial functions should be recorded as “NDIA dba WID XYZ Chapter” (“dba” means “doing business as”).

**Signature Authority**

Determine who you want to have signature authority. You should choose two to three of your officers, definitely the treasurer and president, possibly the secretary and a vice president if you have one. By having multiple individuals with signature authority, you are prepared in case someone moves or becomes incapacitated.

### **Financial Information about Our Chapter**

Our chapter's financial institution \_\_\_\_\_

Location \_\_\_\_\_

Point of contact \_\_\_\_\_

Address \_\_\_\_\_

Telephone/fax/e-mail \_\_\_\_\_

Board members with signature authority for our account are

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Checking account number \_\_\_\_\_

Savings account number \_\_\_\_\_

Other account number \_\_\_\_\_

The federal identification number (employer identification number) is: \_\_\_\_\_

This is the NDIA number, and WID and its chapters use it. (No separate number for WID.)

## WID CHAPTER FINANCIAL REPORT

Fiscal Year 2014 (10/1/13 through 9/30/14)

WID Chapter Name: \_\_\_\_\_

Please round to nearest dollar.

1. **CHAPTER ASSETS** (*As of 9/30/14*) (line 6d of your FY-13 Report) \$ \_\_\_\_\_
2. **REVENUE FY-14**
  - a. Seed money (if applicable) \$ \_\_\_\_\_
  - b. Meeting fees (registration you charged attendees) \$ \_\_\_\_\_
  - c. Donations \$ \_\_\_\_\_
  - d. Interest & dividends \$ \_\_\_\_\_
  - e. Other (*Specify*) \_\_\_\_\_ \$ \_\_\_\_\_
  - f. **TOTAL** \$ \_\_\_\_\_
3. **EXPENSES FY-14**
  - a. Meeting Expenses (Incurred to conduct events) \$ \_\_\_\_\_
  - b. Direct Lobbying \$ \_\_\_\_\_
  - c. Grass Roots Lobbying \$ \_\_\_\_\_
  - d. Other (*Specify*) \_\_\_\_\_ \$ \_\_\_\_\_
  - e. **TOTAL** \$ \_\_\_\_\_
4. **NET GAIN/LOSS DURING FY-14** (Subtract 3e from 2f) \$ \_\_\_\_\_
5. **CHAPTER ASSETS - As of 9/30/14** (Add 1 and 4) \$ \_\_\_\_\_
6. **CHAPTER ASSETS BREAKOUT - As of 9/30/14 (TOTALS from 5 and 6 should be equal)**
  - a. Bank accounts (*Checking, Savings*) \$ \_\_\_\_\_
  - b. Investments (*CDs, Investment Accounts, etc.*) \$ \_\_\_\_\_
  - c. Other (*Specify*) \_\_\_\_\_ \$ \_\_\_\_\_
  - d. **TOTAL** \$ \_\_\_\_\_
7. **CHAPTER FINANCIAL AUDIT – Attach a copy of your audit for FY 14**  
Date of audit \_\_\_\_\_/Audit type (see Chapter Manual) \_\_\_\_\_

Chapter Treasurer Signature / Print Name

Date

Chapter President Signature / Print Name

Date

Please retain a copy of this report for chapter records.

Questions: Contact Barbara Dunlavey at 703-247-2551 or [bdunlavey@ndia.org](mailto:bdunlavey@ndia.org)

Revised 8/8/14

## WID CHAPTER FINANCIAL REPORT

Fiscal Year 2014 (10/1/13 through 9/30/14)

**WID Chapter Name:** \_\_\_\_\_

### CHAPTER EVENTS HELD DURING FY 14

List chapter events held Oct. 1, 2013-Sep. 30, 2014 (excludes board, committee, or planning meetings).

Indicate the number who attended from government and from industry.

Event date	Event type (for example, luncheon, seminar)	# Attendees from government	# Attendees from industry
------------	---------------------------------------------	-----------------------------	---------------------------

**Chapter contact for information about events (name, telephone, e-mail):**

### FUNDING OF SCHOLARSHIPS

If the chapter provides scholarships, list below. Indicate whether the chapter involvement is simply a donation of funds to another organization or whether the chapter actively controls and manages the scholarship or award item or program. If you do not offer scholarships, please make that note.

Scholarship name	\$ Amount	# of Awards	Is this a donation only?	Does the chapter manage it?
------------------	-----------	-------------	--------------------------	-----------------------------

**Chapter contact for information about scholarships (name, telephone, email):** \_\_\_\_\_

### SUPPORT FOR SCIENCE, TECHNOLOGY, ENGINEERING AND MATH EDUCATION

What FY 13 chapter activities, awards, benefits, or programs supported education in science, technology, engineering and math?

### SOCIAL MEDIA

List your chapter's participation in social networking, such as Facebook or LinkedIn.

How are you using social media? Do you have quantitative results of benefits of using it?

If your chapter has a web presence other than being hosted on the WID National site, list URL.

### PLANNING

What is your chapter's top improvement objective for the 2014 program year?

### CHAPTER LEADERSHIP

List the chapter officers and board of directors for the new fiscal year 2015.

Deadline: October 30. Questions: Barbara Dunlavey (703) 247-2551 or [bdunlavey@ndia.org](mailto:bdunlavey@ndia.org)



## Acknowledging Donations

Both the national organization and WID chapters receive donations, most of which are intended for the HORIZONS Scholarship Program or for a chapter's scholarship program. The Internal Revenue Service requires organizations like ours to acknowledge donations equal to or greater than \$250. However, we request you provide a written acknowledgement for all donations received because it is good for donor relations.

The acknowledgement should be prepared on WID letterhead (so the organization's name is shown). It should contain the date and amount of the contribution and be signed by the chapter president or staff director. A sample is shown below.



### **Women In Defense A National Security Organization**

Affiliate, National Defense Industrial  
Association

**XYZ Chapter  
P.O. Box 123  
Bedrock, VA 22203**

April 30, 2014

Ms. Wilma Flintstone  
12 Alabaster Lane  
Heaven Hill, VA 22200

Dear Ms. Flintstone:

Thank you for your donation check of April 15, 2014, in the amount of \$25.00 to the Women In Defense XYZ Chapter. The funds will be used to support the WID chapter scholarship.

Women In Defense is an affiliate of the National Defense Industrial Association, which is recognized by the IRS as a tax-exempt education association under section 501(c)(3) of the Internal Revenue Code. Please consult your tax advisor for specific advice concerning permissible deductions.

This letter is your receipt for record purposes.

Please accept our gratitude and appreciation for your support.

Sincerely,

Betty Rubble  
Chapter President

cc: Executive Director, Women In Defense

## Events and Activities

Chapters are organized geographically for the purpose of encouraging local activities that support the Association's vision, mission and goals. Activities must be self-supporting and provide the fiscal support the chapter requires to administer its responsibilities. Thus, the chapter board must focus on the interests of its members, preference for types of activities (breakfasts, lunch, dinners, tours, etc.), and the availability of appropriate resources (speakers, facility) to produce an activity meaningful to your members.

Please avoid terms such as "cocktail party," "Christmas party," or similar ideas. In our current climate of intense scrutiny of government and non-profit activities, err on the side of caution. Opt for names such as "networking reception" or "holiday reception."

### Sample WID Chapter Activities

- Meal events (luncheons, dinners) with speakers (from industry, military, local, state and federal government)
- Mentoring programs; brown bag lunches for mentors and protégés to meet
- Charitable endeavors that relate to the WID mission (Dress for Success)
- Scholarship programs and fundraising (golf tournaments)
- Half-day, one-day conferences on defense-related topics; training symposia

### Joint Events

Co-sponsoring events with other organizations can be an effective way to make the most of resources. Be sure to specify in writing each group's expectations before committing, especially regarding payment of expenses, receipt of revenue, and division of labor. You might consider hosting events with your local NDIA chapter, NDIA divisions, or other affiliates of NDIA. Working with other defense-related associations is another option.

### Local and National Responsibilities

NDIA chapters are often approached by government organizations to conduct a major event when the government organization wants both industry and government to participate. This is also possible for WID chapters. Chapters must recognize that they are being approached as the local NDIA or WID representative. That does not mean that the government organization can or has designated the chapter to manage the activity. If your chapter receives such a request, notify WID national.

If an activity is limited to chapter members, it is by definition **a local event**. If an event is outside the chapter area, it is by definition **a National event** to be managed by National Headquarters. If the requested event has the potential to attract attendees from outside the chapter's geographical boundary or require National level speakers or significant numbers of attendees from outside, the chapter president should notify the staff director.

### Management Responsibilities

Chapter leaders are responsible for managing events in a way that reflects favorably on the association. There are many ways to manage events. Typically, the work is done by volunteer members. This is an excellent way to involve members, and that can yield not only a well-run event, but one where participants feel a sense of ownership and pride. That in turn can build member loyalty and retention.

## NDIA Media Relations Guidance for Events

**Introduction:** The National Defense Industrial Association (NDIA) welcomes and encourages media attendance and participation at the unclassified events produced by its Divisions, Committees, Chapters and Affiliates (Association for Enterprise Information – AFEI, Precision Strike Association – PSA, National Training and Simulation Association – NTSA and Women in Defense – WID). NDIA organizes events to facilitate the exchange of information between Industry and Government on national security issues. News professionals are important participants in this information exchange. To optimize the results for NDIA and the media, accommodations must be made to enable media professionals to access the information they need to accurately report on events and activities.

**Scope:** This procedure is to be followed by all NDIA entities, to include any entity or activity that displays an NDIA brand (i.e., Divisions, Committees, Chapters, and Affiliates and their related chapters and committees).

**Responsibilities:** It is the responsibility of NDIA event leadership at all organizational levels to ensure that members of the media are afforded access to all events designated as open to the media. In the absence of other specific designation, Division and Committee Chairs, and Chapter and Affiliate Presidents/Executive Directors shall be accountable for the media relations and guidelines for events conducted under the auspices of their NDIA organization.

**Procedures:** Positive media relations are the product of detailed planning and consistent execution to standard. This section outlines required media planning and operating tasks and standards in support of any public event produced by an NDIA entity.

The NDIA entity involved in organizing an event must work with all other participating organizations (e. g., USSOCOM, TACOM, PACOM, other Associations, etc.) to develop and codify mutually agreed guidelines. A representative from each organizing entity must sign-off on the guidelines to ensure clear and common understanding by all concerned. To assist in media guideline development, the attached template “Media Guidelines template 9-5-14” has been provided.

Once guidelines have been developed, invite and encourage media professionals to preregister for the event. Preregistration allows for time to verify media credentials, to distribute guidelines and answer questions related to the event.

Be mindful that since we now live in a digital world, media members can and will report for internet publications/websites and blogs, as well as, traditional media outlets.

Also be mindful that today, “news” is also produced by others who do not seek media credentials and who do not work for entities traditionally recognized as news organizations. Smart phones are ubiquitous and permit bloggers and similar Internet commentators to transmit what is going on at a conference, including video and stills. If news media ground rules for a conference do include restrictions, consider whether they should be announced to all attendees to capture bloggers and other independent Internet outlets.

After a media member is preregistered, a copy of the guidelines will be sent electronically, along

with a ‘thank you’ for registering for the event. The ‘thank you’ needs to include instructions on where and when to pick up their badge onsite at the event.

To assist in the ‘thank you’ email development, the attached template “NDIA Media Registration Reply email Template 9-5-14” has been provided.

A printed copy of the guidelines will be presented to the media member when they pick up their badge onsite from a designated conference official. The conference official will review the media guidelines with the media member and field any questions at this time.

Speakers and presenters will be sent a copy of the media guidelines electronically so they are aware there is a media presence at the event. They should also be reminded verbally by conference leadership onsite at the event.

Remember that the media members in attendance are professionals on the job just like members of the event leadership team. Treat them with the respect, be courteous and respond to their questions and requests. Attempt to accommodate all reasonable requests. Sometimes a ‘no’ may be the right response, but when rendered, it should be accompanied by an underlying rationale.

The following will typically be allowed at an NDIA event unless the military/government has requested a portion of the event be closed, or restricted in some fashion (i.e. ‘no questions’ or ‘no photos’). Decisions to close or restrict an event or part of an event at the request of government/military or industry participants must be clearly articulated to the media and attendees prior to the event and included prominently in media guidelines. Note that the guidelines below should be considered the ‘default’ positions – circumstances may dictate deviations, but only in unusual situations, and then only after careful study and consideration by event leadership.

Media members will be allowed to ask follow-up questions of speakers and presenters in event areas authorized for general attendee access. It is advisable to let the speaker/presenter themselves make the decision to answer the media members’ questions, or not.

Photography will be allowed in the conference sessions and breakout rooms as long as it is not disruptive.

Videotaping of conference sessions or panels will be considered upon request. Videotaping of the event is not allowed for the purpose of rebroadcasting the sessions in their entirety. An exception to that would be the Pentagon Channel or similar military/government broadcasting entity with prior coordination.

Audio taping of conference sessions is approved for the personal use of the media member as it allows for more accurate reporting. These audio recordings may not be rebroadcasted in any format.

Copies of the presentations/slides can be made available if requested onsite or following the event, but may only be made available with the approval of the presenter. It is not unusual for presentation slides to be allowed to be briefed publicly, but not publicly distributed in hard copy. If photography, videography and/or audio recording is not permitted in the exhibit hall, include these restrictions in all media guidelines as well as in event signage. If photography, videography or audio recordings are permitted, then attendees and members of the media must ask the

permission of booth personnel before capturing visual or audio content. It is also possible to have a third scenario where only members of the media may capture visual and audio content after they obtain permission of booth personnel.

If a member of the media violates any of the published guidelines, event staff should politely remind them of the guidelines and ask them to respect the wishes of the presenters, government participants and show management.

- DO NOT REMOVE MEDIA REPRESENTATIVES FROM ROOM OR FACILITY
- DO NOT ATTEMPT TO CONFISCATE CAMERAS OR OTHER RECORDING DEVICES
- DO NOT DEMAND DELETION OF PHOTOS, OR OTHERWISE CORRECTIVELY ENGAGE MEDIA.

If a media professional is unwilling to adhere to the event guidelines, event staff should record their name and report the incident to event management/leadership. All security personnel onsite at an event need to be fully and completely aware of the guidelines as it affects their assignment at the event.

**Attachments:**

- Media Guidelines Template 9-5-14
- NDIA Media Registration Reply email Template 9-5-14

**Questions:** Any questions or concerns on media relations or developing guidelines please contact:

Dino Pignotti, Vice President Advertising  
National Defense Industrial Association  
Ph: 703-247-2541 E-mail: dpignotti@ndia.org

**NDIA Medial Registration Reply Email Template**

*This NDIA template is designed to help create a media registration confirmation email for an event.*

*All sections in red are instructional in nature and must be deleted before sending the email confirmation.*

*All sections in blue are items that need to be updated to be event specific. (Delete this line)*

**Subject line:**

Media Registration Confirmation and Badge Pick-Up Instructions for [Enter Event Name Here](#)

Dear [Enter Registrants Name Here](#):

The [enter National Defense Industrial Association \(NDIA\)](#), affiliate, division or chapter name followed by (abbreviation if applicable) and insert additional event partners full names here (could include military/government partners, e.g. USSOCOM or PEOSTRI) followed by abbreviations (if no partners delete and adjust the paragraph) would like to thank you for registering as media to cover [Enter Event Name Here](#).

To help you with your planning, we have attached the media guidelines for [Enter Event Name Here](#) and the agenda can be found online at [enter the event URL where the agenda is posted here](#). Please choose option A or B and delete the other.

Option A is for an event with no press room. The location of where the media can obtain their media credentials must replace the “Main registration counter.”

Option B is for an event with a press room. The location of the press room must be entered to replace “[Meeting Room #1, Anywhere Convention Center](#).”

A. You can obtain your media credentials and guidelines at the [main registration counter](#). The registration counter will be open

The [main registration counter](#) will be open:

- [Monday, November 30, 20XX - 8:00 AM – 5:00 PM](#)
- [Tuesday, December 1, 20XX – 7:00 AM – 6:30 PM](#)
- [Wednesday, December 2, 20XX – 7:00 AM – 6:30 PM](#)
- [Thursday, December 3, 20XX – 8:00 AM – 5:00 PM](#)

B. You can obtain your media credentials and guidelines in the Press Room, [Meeting Room #1, Anywhere Convention Center](#) and skip the main registration counter.

The Press Room, [Meeting Room #1, Anywhere Convention Center](#), will be open:

- [Monday, November 30, 20XX - 8:00 AM – 5:00 PM](#)
- [Tuesday, December 1, 20XX – 7:00 AM – 6:30 PM](#)
- [Wednesday, December 2, 20XX – 7:00 AM – 6:30 PM](#)
- [Thursday, December 3, 20XX – 8:00 AM – 5:00 PM](#)

If you have any questions, please do not hesitate to contact me directly.

Regards,

Name

Title

Organization

Phone

Email

## NDIA Media Guidelines Template

*This NDIA template is designed to help create Media Guidelines for an event.*

*All sections in red are instructional in nature and must be deleted before publishing the guidelines.*

*All sections in blue are items that need to be updated to be event specific.*

**Introduction:** *The National Defense Industrial Association (NDIA) welcomes and encourages media attendance and participation at the unclassified events produced by its Divisions, Committees, Chapters and Affiliates (Association for Enterprise Information – AFEI, Precision Strike Association – PSA, National Training and Simulation Association – NTSA and Women in Defense – WID). NDIA organizes events to facilitate the exchange of information between Industry and Government on national security issues. News professionals are important participants in this information exchange. To optimize the results for NDIA and the media, accommodations must be made to enable media professionals to access the information they need to accurately report on events and activities.*

*Remember that news professionals are attending the event to do their job and are to be treated with the same respect and professionalism as all other event participants.*



**Insert the event logo here – If no conference logo available, insert the logo of NDIA, Affiliate or Chapter.**

**Media Guidelines for enter Full Event Name followed by (Abbreviation if applicable)**

The enter National Defense Industrial Association (NDIA), affiliate, division or chapter name followed by (abbreviation if applicable) and insert additional event partners full names here (could include military/government partners, e.g. USSOCOM or PEOSTRI) followed by abbreviations (if no partners delete and adjust the paragraph) welcome professional media members to cover this event.

**This section remains the same for all events except for the mention of exhibits inclusion.**

**Eligibility:**

The event organizers require proof of employment as a member of the media to make certain that only qualified media receive media credentials and gain access to event sessions and the [exhibit hall](#). **(Delete “and the exhibit hall” if event does not have exhibits)**

It is required that media credentials are presented such as, press passes, business cards, letters of verification and other identification (i.e. a copy of a publication sample editorial work and/or name on the masthead, a link to an article previously written, etc.) be provided when preregistering, registering onsite or when picking up a preregistered media/press badge. Freelance Writers are asked to provide a reason for attending the events, which can be done through a letter or email from the publication being represented, or if working independently a statement of editorial work will be considered. The above also applies for photojournalists/videographers.

Event organizers can refuse to issue media credentials for any individual not fitting the above requirements. Advertising, marketing, business development, publishers, business operations, and public relations personnel may not register as media.

**Access and Rules of Engagement:**

**Please choose option A or B and delete the other.**

**Option A is for an event with no press room. The location of where the media can obtain their media credentials must replace the “Main registration counter.”**

**Option B is for an event with a press room. The location of the press room must be entered to replace “[Meeting Room #1, Anywhere Convention Center](#).”**

**C. Pre-registered media can obtain their media credentials and guidelines at the [main registration counter](#). If registering onsite, please allow extra time for the registration process before sessions begin.**

- D. Pre-registered media can obtain their media credentials and guidelines in the Press Room, [Meeting Room #1, Anywhere Convention Center](#) and skip the main registration counter. If registering onsite, please allow extra time for the registration process before sessions begin.

Use the following only if there is a press room. Make sure to include the location of the press room. If there is no press room, delete.

The Press Room, [Meeting Room #1, Anywhere Convention Center](#), will be open:

- Monday, November 30, 20XX - 8:00 AM – 5:00 PM
- Tuesday, December 1, 20XX – 7:00 AM – 6:30 PM
- Wednesday, December 2, 20XX – 7:00 AM – 6:30 PM
- Thursday, December 3, 20XX – 8:00 AM – 5:00 PM

The following two paragraphs are used if an event has a press room. The information needs to be tailored to let the media know some details on what work related amenities (examples below) will be available at the event for their planning purposes. If there is no WiFi provided delete the whole paragraph. If there is no press room, delete both paragraphs.

There will be tables set up with chairs in the Press Room that can be used for interviews and workstations. The room is not set up for large scale press conferences/announcements.

Wi-Fi access will be provided for the media's use. It can be accessed with the network ID: [enter specific network ID here](#) and the password: [enter specific password here](#). The Wi-Fi will be accessible [only in the Press Room or throughout the convention center](#).

If the event has an event logo, please choose option A or B as it pertains to the event and delete the other. Note if option A is selected, the second sentence must be tailored on how to obtain the logo for the event. If the event does not have logo, delete option A and B.

- A. The event logo is available to be used by the media. [Please email the NDIA Press contact who will reply with a digital file of the logo](#). It is asked that the logo be presented on a light colored background to enhance readability.
- B. The event logo is not available to be used by the media.

Please choose option A or B and delete the other.

Option A is for an event without exhibits. "Press Room" is used as an example location, it could be another location at an event, please update accordingly.

Option B is for an event with exhibits. "Press Room" is used as an example location, it could be another location at an event, please update accordingly.

- A. Background information, bios and copies of the presentations/slides that have been approved for release by the respective presenters will be available in the [Press Room](#). If a presentation/slides is not available onsite, a request can be made to the NDIA Press Contact after the event has concluded, and it will be provided if approved for release.
- B. Background information, bios and copies of the presentations/slides that have been approved for release by the respective presenters will be available in the [Press Room](#). If a presentation/slides is not available onsite a request can be made to the NDIA Press Contact after the event has concluded and it will be provided if approved for release. Press/Media Kits will also be available in the [Press Room](#) from exhibiting organizations that elected to make them available.



The following relates to embargoed information at the event. Please use option A or B as it pertains to the event.

Option A is an example of an event with content that has an embargo. In this situation, typically a speaker wants some information from the speech to be delivered by the media quickly and accurately, so it is provided to the media ahead of time under an embargo to be released after a specific time.

Option B is used if no embargo restrictions pertain to the event.

A. General Christopher Carter, USA, Commanding Officer, USAMO will be delivering the Keynote address at the event. In respect of the media's deadlines and the busy afternoon conference schedule a copy of General Smith's keynote address is available prior to the event by request, but is embargoed until the end of the speech at 1:30 PM Tuesday, December 1, 20XX. All other information delivered at the event in the sessions that are open to the media is not under any embargo restrictions and can be released immediately.

B. There are no embargo restrictions on any information at the event.

Used for all events, unless there are no government speakers and participants. If no government speakers or participants, delete.

After obtaining media credentials, the Government POCs (listed below) can assist in receiving and adjudicating any requests for interviews with government speakers or participants.

Next 4 paragraphs are used for all events. Only change needed is to delete the "exhibit hall" reference if there is no exhibit hall.

Media/Press Badges must be worn at all times when attending the event. This includes attending conference sessions/panels/roundtables, [exhibit hall](#) as well as during interviews with any event participants.

Many of the sessions and panels are open to the media and are "on-the-record." Please see below for a list of events/sessions that are open with restrictions or closed to members of the media.

Follow-up questions may be asked after the presentations if specified by the session moderator or speaker. It is requested that media members clearly state their name and the publication, website or television network/station name they represent before asking questions.

It is also requested that media members identify themselves as press when engaging in conversations with all event participants.

The following paragraph is to encourage the media to use the event name and hashtag in their reporting and tweeting. Please enter the full event name and hashtag in the underlined portions of the paragraph below.

Event organizers request that media members mention [Full Event Name Here](#) by name in any reporting of information obtained at the event. If tweeting, please use [Enter Event Hashtag Here](#) (i.g. #NDIAConf).

This section identifies what sessions at the event are open with restrictions, closed to the media and open to the media. Please choose option A, B, C or D as it pertains to the event and delete the others. If the option selected has a list of 1), 2) and 3) please list the session names, rooms and times as listed in the agenda. Exact number will vary by event requirements.

**A. Events OPEN with restrictions or CLOSED to the media:**

While it is recommended to keep events open to the media, there might be a reason to have a session open with restrictions. For example, maybe one presenter does not want his/her slides to

be photographed, or a speaker has a prototype as a prop that they do not want photographed. In this case the session would be listed as the content is open to the media but photography and video recordings are prohibited during the session. The exact restrictions must be listed along with the session names, rooms and times as listed in the agenda.

The following events are OPEN to the Media with restrictions:

- 1.)
- 2.)
- 3.)

The following events are CLOSED to the Media:

- 1.)
- 2.)
- 3.)

The remainder of the event's scheduled sessions are considered "on-the-record" and open to the media, however, event organizers can elect to close a previously open portion of the program at their discretion and will communicate these changes appropriately to members of the media and attendees.

**B. Events OPEN with restrictions:**

While it is recommended to keep events open to the media, there might be a reason to have a session open with restrictions. For example, maybe one presenter does not want his/her slides to be photographed, or a speaker has a prototype as a prop that they do not want photographed. In this case the session would be listed as the content is open to the media but photography and video recordings are prohibited during the session. The exact restrictions must be listed along with the session names, rooms and times as listed in the agenda.

The following events are OPEN to the Media with restrictions:

- 1.)
- 2.)
- 3.)

The remainder of the event's scheduled sessions are considered "on-the-record" and open to the media, however, event organizers can elect to close a previously open portion of the program at their discretion and will communicate these changes appropriately to members of the media and attendees.

**C. Events CLOSED to the media:**

The following events are CLOSED to the Media:

- 1.)
- 2.)
- 3.)

The remainder of the event's scheduled sessions are considered "on-the-record" and open to the media, however, event organizers can elect to close a previously open portion of the program at their discretion and will communicate these changes appropriately to members of the media and attendees.

#### **D. All Event Sessions OPEN to the media:**

All of the event's scheduled sessions are considered "on-the-record" and open to the media, however, event organizers can elect to close a previously open portion of the program at their discretion and will communicate these changes appropriately to members of the media and attendees.

The next section identifies the restrictions at the event as it relates to photography, video and audio. Please select option A or B and delete the other.

Option A has an exhibit hall.

Option B has no exhibit hall.

#### **A. Photography, Videography and Audio Guidelines:**

##### Conference Sessions:

Photography is allowed in the conference sessions as long as it is not disruptive. Videotaping of any of the conference sessions must be cleared with event organizers before it occurs. These requests may or may not be approved.

Audio recording in the conference sessions is approved for the personal use of the media. These audio recordings may not be rebroadcasted in any format.

##### Exhibit Hall:

All media members must obtain permission and releases (if requested) from any exhibiting organization/company that they are photographing, videotaping and /or recording audio. Care must be taken when operating in the exhibit hall that only the organization/company that you have permission to photograph, videotape or record is captured. Neighboring companies/organizations exhibits cannot be included unless there is permission to do so.

**VERY IMPORTANT** – Photos, videos and /or audio cannot be used by any organization or individual to inadvertently or purposely show Government or Industry endorsement for anything other than the event in which the are actively participating.

#### **B. Photography, Videography and Audio Guidelines:**

##### Conference Sessions:

Photography is allowed in the conference sessions as long as it is not disruptive. Videotaping of any of the conference sessions must be cleared with event organizers before it occurs. These requests may or may not be approved.

Audio recording in the conference sessions is approved for the personal use of the media. These audio recordings may not be rebroadcasted in any format.

**VERY IMPORTANT** – Photos, videos and /or audio cannot be used by any organization or individual to inadvertently or purposely show Government or Industry endorsement for anything other than the event in which the are actively participating.

This section is to identify the POCs for the media to engage with if they have any questions or requests. If there is a press/media room, the location needs to be listed, if not the location line needs to be deleted along with the "& Location" in the header. Please note that there can be POCs for several different organizations, when there are multiple event partners. This depends on the number of organizing partners, the number of contacts at each organizing partners or it might be decided that there will be one single contact for the event. Please tailor to the event.

## **Press Contacts & Location:**

The Press/Public Affairs Room Location:

---

### **Government POCs**

Name:

Title:

Email:

Mobile:

Name:

Title:

Email:

Mobile:

### **NDIA POCs**

Name:

Title:

Email:

Mobile:

Name:

Title:

Email:

Mobile:

### **Partner Organization POCs**

Name:

Title:

Email:

Mobile:

Name:

Title:

Email:

Mobile:

A disclaimer needs to be included at the end of every media guidelines for an event. Please select option A or B and delete the other.

Option A has an exhibit hall.

Option B has no exhibit hall.

- A. Please remember that press/media badges are a privilege and can be revoked by event organizers at any time. Reasons include, but are not limited to, the unauthorized photographing or videoing of exhibits, other than those exhibits for which permission has been granted, unauthorized photographing or videoing of conference sessions where photos and/or video is prohibited, attending conference sessions or functions where media are prohibited, and the solicitation of advertisements, exhibit space, sponsorships, etc. in the conference and exhibition controlled areas.**

- B. Please remember that press/media badges are a privilege and can be revoked by event organizers at any time. Reasons include, but are not limited to, unauthorized photographing or videoing of conference sessions where photos and/or video is prohibited, attending conference sessions or functions where media are prohibited, and the solicitation of advertisements, exhibit space, sponsorships, etc. in the conference controlled areas.**

## Sample Program Planning Checklist

Following is a checklist of management responsibilities used by one successful chapter. Some chapters rely on a program committee to execute events, while others might use their officers. A number of the items listed below can be delegated to other individuals. When a member plays even a small part, it offers a way to deepen her involvement and commitment to the organization.

### I. PROGRAM CHAIR

- ☐ Determine type of program (for example, lunch with speaker, brown bag networking)
- ☐ Secure event location
- ☐ Obtain event speaker
- ☐ Set a budget for revenue and expense. Determine a price to charge attendees that sufficiently covers expenses. Be sure to have a member/non-member price.
- ☐ Choose menu
- ☐ Secure audiovisual needs
- ☐ Prepare early announcement; e-mail message; website
- ☐ Advertise event locally with other defense-related associations
- ☐ Promote event by sending announcement to WID/NDIA administrative support
- ☐ Determine program details—select a mistress of ceremonies (probably the Chapter President), someone to introduce the speaker, leader of the Pledge of Allegiance, etc.
- ☐ If a large event, apprise WID National staff director
- ☐ Develop a printed program to include guest speaker's biography and other elements
- ☐ Take reservations
- ☐ Provide photos and articles for inclusion in newsletters and website

### II. TREASURER

- ☐ Set up registration/welcome table at event
- ☐ Have a change fund
- ☐ Have receipts available if needed
- ☐ Settle with meeting facility, caterer
- ☐ Provide financial results at next board or committee meeting

### III. MEMBERSHIP CHAIR

- ☐ Bring brochures and applications
- ☐ Greet and sign up new members
- ☐ Promote membership

## Style Guide

To ensure we remain true to our branding and to keep consistency, a few standards exist to guide all facets of the organization—the National Board, Chapters, potential Chapters, NDIA, other NDIA affiliates. These standards apply to printed materials plus internet-based ones. A consistent style enhances our professional image, so always proof your documents carefully. For questions, contact the staff before printing or going live. Be sure to relay these points to outside writers, designers, website developers and all who work with you.

### References to the Organization

- The correct way to write the full name of the association is:  
**Women In Defense, A National Security Organization**
- The phrase “A National Security Organization” is part of the full official name, not a description.
- Please note that the “I” in “In” is capitalized.
- The font for all words in the name is always the same size; that is, “A National Security Organization” should be the same font and size as “Women In Defense.”
- The organization name may be abbreviated to “WID” (with no periods) or to “Women In Defense,” after the full name of the organization has been used in the document.
- The name of the WID scholarship program should be in all capital letters: **HORIZONS**.

### Referencing the relationship to NDIA

- When referencing the relationship to NDIA, the correct way is:  
**Women In Defense, A National Security Organization, an affiliate of the National Defense Industrial Association**
- The full organization name should be used when including our affiliation with NDIA.
- For documents where the names will stand alone—letterhead, web site, etc.—the words **an affiliate of the National Defense Industrial Association** should be a smaller font. In this instance, do not use “WID” alone.

### Logo, website

- The logo should be printed in red and blue **or** solid black. Reverse white is not recommended.
- WID colors are **Pantone Red 032** and **Pantone Blue 2747**. Please avoid variations.
- The WID National web site should be written: <http://wid.ndia.org>. It should **not** include www.
- The official WID logo was introduced October 1, 2009. Additionally, each chapter has been provided its own unique logo. No other logo is permitted. Chapters may not design their own logo.

### Chapters

- Chapters of WID should be named WID Chapter Name. For example, WID XYZ Chapter.
- For clarity, it is a good idea for both chapters and national to be specific in cases such as “The WID National President will speak” or “The president of the WID XYZ Chapter will speak” or “The WID XYZ Chapter annual dinner” or “The WID National conference.”

## **Procedures and Practices of Our Chapter**

List your Chapter's procedures and practices.



## Lobbying

**Note:** The following section references NDIA, but WID is an integral part of NDIA, so all the same information applies to WID.

**Questions:** Will Goodman, Vice President for Policy, [wgoodman@ndia.org](mailto:wgoodman@ndia.org)

NDIA does not employ a registered lobbyist. At the present time, none of NDIA's lobbying activities reach the threshold established under the Lobbying Disclosure Act. Should NDIA choose at some point to register a lobbyist, it is the policy of NDIA that all lobbying activities will be conducted and monitored at the National Headquarters in Washington. Under the Lobbying Disclosure Act, NDIA is required to report all costs associated with any lobbying activities, which we did four times each year when the Association employed a registered lobbyist.

The following is a brief fact paper that should answer many questions concerning what is lobbying, NDIA's limited lobbying activities, and NDIA guidance concerning election year activities. It is critically important to NDIA that the rules pertaining to lobbying and political activities be strictly followed. The penalties not to do so are severe and could involve the loss of our tax exempt status without possibility of getting it back and/or significant financial penalties.

### Background

The National Defense Industrial Association is a nonprofit educational association exempt from federal income tax under section 501(c)(3) of the U.S. Internal Revenue Code—the section of the IRS Code which applies to scientific or educational associations or foundations, as well as charitable and religious organizations. As such, no “substantial” percentage of activities of a 501(c)(3) organization may be focused on “propaganda, or otherwise attempting to influence legislation...”—in other words, on lobbying. Further, 501(c)(3) organizations are completely prohibited from engaging, directly or indirectly, in any political campaign for or against a candidate for local, state or federal office.

### What Is Lobbying?

It is important for both association leaders and staff to be clear about what constitutes lobbying.

- Direct lobbying includes oral or written communication with members of a legislature, their staff, political appointees, or senior executive personnel for the purpose of influencing legislation. Preparation for lobbying is included in the definition of lobbying.
- “Lobbying contacts” may be made regarding legislation (its formulation, modification or adoption), administration or execution of a federal program or policy, or nomination or confirmation on any person requiring a Senate confirmation.
- If an association urges its members to contact legislators regarding pending legislation, this is considered direct lobbying.

Any communication which urges NDIA members—explicitly or implicitly—to contact legislators regarding a specific piece of legislation must be considered lobbying.

If an association communicates with its members regarding a piece of legislation on which the association has not taken a position, it will not necessarily be considered lobbying.

- Grassroots lobbying is an attempt to influence legislation through a communication with the general public—including reference to specific legislation, an expression of the association's views on that legislation, and a call for action. Note that while associations often use the term “grass roots” to refer to their own members, to the IRS it means the broader public outside the association membership.

- If an association conducts or commissions a research study for use in lobbying, the study itself must be considered lobbying. If the study is intended primarily for non-lobbying purposes—but is later used in lobbying, it would not generally be considered lobbying.
- Meetings may constitute a “lobbying communication” if the meeting is used to urge members to act for/against specific legislation.
- “Lobbying activity” includes certain activities undertaken in preparation for lobbying—e.g. planning and preparation, coordination with other lobbyists. Travel time may be considered a lobbying activity for purposes of tracking lobbying expenditures.

### **What Kinds of Public Policy Communications Would Not Be Considered Lobbying?**

It is equally important for NDIA leaders and staff to understand what does not constitute lobbying.

- If an association responds to a request from a Congressional, Federal, or State agency for information, that does not constitute lobbying.
  - Participation on a federal advisory committee does not constitute lobbying.
  - Providing comments in response to a proposed rulemaking is not lobbying.
  - Testimony before a Congressional committee or subcommittee, at the request of that committee or subcommittee, is not lobbying.
  - If NDIA requests an opportunity to provide testimony, that may be considered lobbying.
  - An amicus curiae brief filed in the course of a judicial proceeding is not lobbying.
  - A statement filed during an administrative adjudication is not lobbying.
- Reporting Requirements Separate from—and in addition to—the IRS regulations, which limit expenditures for lobbying by 501(c)(3) organizations, NDIA, like other associations, must comply with the provisions of the Lobbying Disclosure Act.
- The Lobbying Disclosure Act requires registration by every lobbyist. A lobbyist is an individual “employed or retained by a client for financial or other compensation” to make one or more “lobbying contact.”
  - Quarterly, an association employing lobbyists files a report with the Secretary of the Senate and Clerk of the House of Representatives including, among other information, a list of specific issues on which the registered organization engaged in lobbying activities and which Houses of Congress and/or executive agencies were contacted.

### **Election Year and Other Political Activities**

NDIA, as a 501(c)(3) non-profit, educational association. The following information on Election Year Activities and the Prohibition on Political Campaign Intervention for Section 501(c)(3) Organizations (adapted from IRS Publication 1828) is provided for your information and compliance. Please pay particular attention to the sections concerning invitations for Candidate Appearances (Speaking as a Candidate and Speaking or Participating as a Non-Candidate) and the section on Web Sites.

### **The Prohibition on Political Campaign Intervention**

Under the Internal Revenue Code, all section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office. The prohibition applies to all campaigns including campaigns at the federal, state and local level. Violation of this prohibition may result in denial or revocation of tax-exempt status. Those 501(c)(3) organizations that are private foundations are subject to additional restrictions that are not described in this fact sheet.

### **What is Political Campaign Intervention?**

Political campaign intervention includes any and all activities that favor or oppose one or more candidates for public office. The prohibition extends beyond candidate endorsements. Contributions to political campaign funds or public statements of position (verbal or written) made by or on behalf of an organization in favor of or in opposition to any candidate for public office clearly violate the prohibition on political campaign intervention. Distributing statements prepared by others that favor or oppose any candidate for public office will also violate the prohibition. Allowing a candidate to use an organization's assets or facilities will also violate the prohibition if other candidates are not given an equivalent opportunity. Although section 501(c)(3) organizations may engage in some activities to promote voter registration, encourage voter participation, and provide voter education, they will violate the prohibition on political campaign intervention if they engage in an activity that favors or opposes any candidate for public office. Certain activities will require an evaluation of all the facts and circumstances to determine whether they result in political campaign intervention.

### **Voter Education, Voter Registration and Get Out the Vote Drives**

Section 501(c)(3) organizations are permitted to conduct certain voter education activities (including the presentation of public forums and the publication of voter education guides) if they are carried out in a non-partisan manner. In addition, section 501(c)(3) organizations may encourage people to participate in the electoral process through voter registration and get-out-the-vote drives, conducted in a non-partisan manner. On the other hand, voter education or registration activities conducted in a biased manner that favors (or opposes) one or more candidates is prohibited.

### **Individual Activity by Organization Leaders**

The political campaign intervention prohibition is not intended to restrict free expression on political matters by leaders of organizations speaking for themselves, as individuals. Nor are leaders prohibited from speaking about important issues of public policy. However, for their organizations to remain tax exempt under section 501(c)(3), leaders cannot make partisan comments in official organization publications or at official functions of the organization. To avoid potential attribution of their comments outside of organization functions and publications, organization leaders who speak or write in their individual capacity are encouraged to clearly indicate that their comments are personal and not intended to represent the views of the organization.

## **Candidate Appearances**

Candidates may appear or speak at organization events in a non-candidate capacity. For instance, a political candidate may be a public figure who is invited to speak because he or she: (a) currently holds, or formerly held, public office; (b) is considered an expert in a non political field; or (c) is a celebrity or has led a distinguished military, legal, or public service career. A candidate may choose to attend an event that is open to the public, such as a lecture, concert or worship service. The candidate's presence at an organization-sponsored event does not, by itself, cause the organization to be engaged in political campaign intervention. However, if the candidate is publicly recognized by the organization, or if the candidate is invited to speak, the organization must ensure that:

- The individual is chosen to speak solely for reasons other than candidacy for public office;
- The individual speaks only in a non-candidate capacity;
- Neither the individual nor any representative of the organization makes any mention of his or her candidacy or the election;
- No campaign activity occurs in connection with the candidate's attendance; and
- The organization maintains a nonpartisan atmosphere on the premises or at the event where the candidate is present.

In addition, the organization should clearly indicate the capacity in which the candidate is appearing and should not mention the individual's political candidacy or the upcoming election in the communications announcing the candidate's attendance at the event.

Before inviting a candidate for public office, NDIA/WID should consult with NDIA VP for Policy, Will Goodman, [wgoodman@ndia.org](mailto:wgoodman@ndia.org).

## **Issue Advocacy vs. Political Campaign Intervention**

Under federal tax law, section 501(c)(3) organizations may take positions on public policy issues, including issues that divide candidates in an election for public office. However, section 501(c)(3) organizations must avoid any issue advocacy that functions as political campaign intervention. Even if a statement does not expressly tell an audience to vote for or against a specific candidate, an organization delivering the statement is at risk of violating the political campaign intervention prohibition if there is any message favoring or opposing a candidate. A statement can identify a candidate not only by stating the candidate's name but also by other means such as showing a picture of the candidate, referring to political party affiliations, or other distinctive features of a candidate's platform or biography. All the facts and circumstances need to be considered to determine if the advocacy is political campaign intervention.

Key factors in determining whether a communication results in political campaign intervention include the following:

- Whether the statement identifies one or more candidates for a given public office;
- Whether the statement expresses approval or disapproval for one or more candidates' positions and/or actions;
- Whether the statement is delivered close in time to the election;
- Whether the statement makes reference to voting or an election;
- Whether the issue addressed in the communication has been raised as an issue distinguishing candidates for a given office;
- Whether the communication is part of an ongoing series of communications by the organization on the same issue that are made independent of the timing of any election; and

- Whether the timing of the communication and identification of the candidate are related to a non-electoral event such as a scheduled vote on specific legislation by an officeholder who also happens to be a candidate for public office.

A communication is particularly at risk of political campaign intervention when it makes reference to candidates or voting in a specific upcoming election. Nevertheless, the communication must still be considered in context before arriving at any conclusions.

### **Voter Guides**

Voter guides are usually pamphlets or other short documents, often in chart form, intended to help voters compare candidates' positions on a set of issues. Preparing or distributing a voter guide may violate the prohibition against political campaign intervention if the guide focuses on a single issue or narrow range of issues, or if the questions are structured to reflect bias.

Although any document that identifies candidates and their positions close in time to an election has the potential to result in political campaign intervention, preparation or distribution of voter guides, because of their nature, present a particular risk for non compliance. The following factors are key considerations in whether a voter guide can be distributed to educate voters without violating the prohibition on political campaign intervention.

- Whether the questions and any other description of the issues are clear and unbiased in both their structure and content.
- Whether the questions posed provided to the candidates are identical to those included in the voter guide.
- Whether the candidates are given a reasonable amount of time to respond to the questions. If the candidate is given limited choices for an answer to a question (e.g. yes/no, support/oppose), whether the candidate is also given a reasonable opportunity to explain his position in his own words and that explanation is included in the voter guide.
- Whether the answers in the voter guide are those provided by the candidates in response to the questions, including whether the candidate's answers are unedited, and whether they appear in close proximity to the question to which they respond.
- Whether all candidates for a particular office are covered.
- Whether the number of questions, and the subjects covered, are sufficient to encompass most major issues of interest to the entire electorate.

In assessing whether a voter guide is unbiased and nonpartisan, every aspect of the voter guide's format, content and distribution must be taken into consideration. If the organization's position on one or more issues is set out in the guide so that it can be compared to the candidates' positions, the guide will constitute political campaign intervention. An organization may be asked to distribute voter guides prepared by a third party. Each organization that distributes one or more voter guides is responsible for its own actions. If the voter guide is biased, distribution of the voter guide is an act of political campaign intervention. Therefore, an organization should reach its own independent conclusion about whether a voter guide prepared by itself or prepared by a third party covers a broad scope of issues and uses neutral form and content.

### **Business Activity**

The question of whether an activity constitutes participation or intervention in a political campaign may also arise in the context of a business activity of the organization, such as selling or renting of mailing lists, the leasing of office space, or the acceptance of paid political advertising. In this context, some of the factors to be considered in determining whether the organization has engaged in political campaign intervention include the following:

- Whether the good, service or facility is available to candidates in the same election on an equal basis;
- Whether the good, service, or facility is available only to candidates and not to the general public;
- Whether the fees charged to candidates are at the organization's customary and usual rates; and
- Whether the activity is an ongoing activity of the organization or whether it is conducted only for a particular candidate.

### **Web Sites**

The Internet has become a widely used communications tool. Section 501(c)(3) organizations use their own web sites to disseminate statements and information. They also routinely link their web sites to web sites maintained by other organizations as a way of providing additional information that the organizations believe is useful or relevant to the public.

A web site is a form of communication. If an organization posts something on its web site that favors or opposes a candidate for public office, the organization will be treated the same as if it distributed printed material, oral statements or broadcasts that favored or opposed a candidate.

An organization has control over whether it establishes a link to another site. When an organization establishes a link to another web site, the organization is responsible for the consequences of establishing and maintaining that link, even if the organization does not have control over the content of the linked site. Because the linked content may change over time, an organization may reduce the risk of political campaign intervention by monitoring the linked content and adjusting the links accordingly.

Links to candidate-related material, by themselves, do not necessarily constitute political campaign intervention. The IRS will take all the facts and circumstances into account when assessing whether a link produces that result. The facts and circumstances to be considered include, but are not limited to, the context for the link on the organization's web site, whether all candidates are represented, any exempt purpose served by offering the link, and the directness of the links between the organization's web site and the web page that contains material favoring or opposing a candidate for public office.

### **Effect of Conducting Multiple Activities**

Although each of the activities described in this fact sheet is described separately, an organization might combine one or more of the types of activity described above. For example, an organization leader may speak about an issue at an event where a candidate appears, or a voter guide might be distributed at a candidate forum. Where there is a combination of activities, the interaction among them may affect whether or not the organization is engaged in political campaign intervention.

### Communicating with Chapter Members

Staying in touch with your chapter members is vital. Each month, the WID administrative assistant will send to your designated membership contact a spreadsheet containing member names and contact information. NDIA is responsible for the database of WID members, so encourage your members to keep their contact information up-to-date by changing their profiles online ([www.ndia.org/Login](http://www.ndia.org/Login)).

Today's complex communications systems mean that Women In Defense and its chapters must comply with related laws. If we do not comply, we run the risk of lawsuits. Here are the steps you need to take in your communications to chapter members.

### E-Mail Communication

Most chapters and the national organization rely heavily on e-mail communication. Prepare a simple, easy-to-read e-mail message with the basic facts and include a link to your website. Avoid attachments, which can cause your message to be caught in a spam filter and not delivered. Put all the details on your site.

**E-mail messages must contain the following statement** at the bottom of your message:

This communication has been sent to you as a member or customer of NDIA and its affiliates AFEI, NTSA, PSA, and WID. Your e-mail address is used to maintain member and customer contact and provide notification of new activities. If you do not wish to receive future messages from NDIA or its affiliates, please send a message to [remove@ndia.org](mailto:remove@ndia.org).

National Defense Industrial Association, 2111 Wilson Boulevard, Suite 400, Arlington, VA 22201

To ensure that you receive all valuable and informative email communications from NDIA, please add [NDIA\\_Events@NDIA.ORG](mailto:NDIA_Events@NDIA.ORG) to your list of trusted senders (called the White-List).

As indicated above, members can request no contact by e-mail. As a result, the member list you receive will not necessarily contain an e-mail address for each member. Try sending a postcard event announcement to those with no listed e-mail address.

### Websites

Chapters should have their own website or have a page on the WID National site. Either way, the site is your image before the world. NDIA hosts the WID National website and coordinates chapter content on it. Chapter and National websites are linked at no cost to the chapter. While the NDIA web operations staff cannot create or maintain your website, they can guide you on development.

**You must contact the WID Executive Director before creating a website or establishing any other means of interactive tools (such as Facebook or LinkedIn) so you receive the most up-to-date guidance, including legal compliance needs, and approval.**

**Website Requirements.** To assure the WID image remains consistent and of high quality and correct procedures are met, the following are required:

1. Chapter websites must contain the official WID logo. WID and NDIA logos must be displayed in the proper colors and layout and must be the original logo received from WID/NDIA, not a copy acquired by cutting and pasting from our site. For a copy, contact WID administrative support. Use the WID logo that became effective October 1, 2009. Each chapter has been given its own unique logo. No other chapter logo is permitted.
2. A Disclaimer/Privacy Statement must be on the site. This statement could be a paraphrase of NDIA's statement, found at:  
[http://www.ndia.org/AboutUs/Pages/Privacy\\_Statement.aspx](http://www.ndia.org/AboutUs/Pages/Privacy_Statement.aspx) and also on the WID website.
3. Web content should be updated constantly. Remove outdated information and correct errors promptly. Pay particular attention to events and board and committee leader names.
4. Fonts should be a normal size between 10 and 14 point. Script fonts are not recommended for text. Navigational buttons should percolate throughout the pages in a standard, template fashion.
5. The style guide in this manual applies to websites as well as to print.
6. The chapter home page should clearly indicate that this is the site of a chapter of WID, thus differentiating it from the National organization or other chapters.
7. When registering with search engines, register in this manner: WID Your Chapter Name. Example: WID Capital Chapter. Subsequent description lines can be tailored.
8. Chapter sites should have a prominent link to the national site—<http://wid.ndia.org>—and to the NDIA site—[www.ndia.org](http://www.ndia.org).
9. Inform the staff director of your intentions to build a website prior to launching it. The staff director must approve it before it can go live. When complete, forward it to the WID administrative assistant so it can be linked to the National site. Requirements stated here must be met before we will link to your site, and they must continue to be met to retain the link.

WID chapters may have a page on the WID National website, which is maintained by the National Defense Industrial Association. NDIA/WID staff will approve information submitted, assuring consistency with the NDIA website. Minor changes might be made. Update your chapter's page on the WID National website by contacting Trina Dickey ([tdickey@ndia.org](mailto:tdickey@ndia.org); 703-247-2589).



## Template for WID Chapter Pages

<a href="#"><u>About the Chapter</u></a>	<a href="#"><u>News &amp; Events</u></a>	<a href="#"><u>Programs</u></a>
<a href="#"><u>Leadership</u></a>	<a href="#"><u>Bylaws</u></a>	<a href="#"><u>Contact Us</u></a>

### XYZ Chapter

#### **About the Chapter**

The **XYZ Chapter**, in Northern Virginia, was founded September 1, 2008.

[NOTE: It is nice to start the page with a few words about the chapter. A brief description of the area you cover helps readers put it in context.]

*The idea of a chapter of Women In Defense in Northern Virginia met with a great deal of enthusiasm. It is in the heart of many military and business endeavors. We have an opportunity to have an impact on the lives of professionals who work in this community on behalf of our nation.*

--Wilma Flintstone, President, XYZ Chapter, September 2008

[NOTE: A quote about the purpose behind the chapter sets a nice tone.]

#### **Leadership**

President	Wilma Flintstone
Vice President	Betty Rubble
Secretary	Zena Martinez
Treasurer	Toya Miller
Chair, Programs	Raquel Stone

[NOTE: Update this list as soon as officers or other volunteers change. The list will be set up so the reader can click & link to e-mail for the person listed. Please provide email addresses]

#### **News & Events**

[This area is for information about your events—upcoming luncheons & breakfasts or other activities. You can also include past events. Pictures are welcome as long as they include captions (where was the photo taken, who is pictured, what are they doing, etc.). Send photos in high resolution jpeg format. Even if you do not have all the details for an upcoming event, it looks good to list the event.]

#### **Bylaws**

View the bylaws of the XYZ Chapter of Women In Defense here.

[We will have this document & can just link a PDF. Nothing needed from you.]

#### **Programs**

[This is for non-event information, for programs such as community outreach (Dress For Success, scholarship programs, and charitable and community endeavors). Describe the program and provide the name and contact information for someone so readers can learn more.]

#### **Contact Us**

Betty Rubble, (703)000-0000, [betty@bedrockdefense.com](mailto:betty@bedrockdefense.com)

[Contact name, telephone, e-mail. Determine someone people can e-mail or call for more details about your chapter. Some chapters list their president; others list another volunteer.]

## **Other Means**

If you are interested in other forms of communication, including interactive ones and social media, you must contact the staff director. Legal requirements and guidelines change frequently, so it is best to make personal contact.

## **Communicating with Other Chapters, National: Share Site**

WID has a collaboration tool to make it easier for chapter leaders and the members of the national board to share examples of work and ideas. Why reinvent the wheel if another chapter has an example of an effective program? Enjoy and learn from one another.

Please provide samples of your own and remember to search this reference when you need inspiration or a sample to follow.

Members of the National Board have indicated a strong desire for chapters to list their upcoming major events. They are interested in attending if travel schedules coincide.

On the share site, documents are roughly organized around “The Big Four” that we mention frequently—leadership, membership, finances, and programs. Governance and bylaws are among the other categories.

To be clear—this tool is an internal one. It is aimed at running the WID organization and its chapters better. For the benefit of members and the general public, we must all keep our websites up-to-date.

The site includes an area for your personal contact information. If your information changes, please update it. You can change your information from the collaboration site (look in the upper right corner--“Welcome Ms. XXX”--and follow the instructions). You can also update contact information directly on the NDIA site—[www.ndia.org/login](http://www.ndia.org/login).

For questions about the site, contact Trina Dickey ([tdickey@ndia.org](mailto:tdickey@ndia.org)).

## **Instructions on using the NDIA/WID Web Collaboration Tool**

### **Introduction**

NDIA’s web collaboration tool is found at: <http://committees.ndia.org>. These pages are used by a few of NDIA’s divisions and affiliates for disseminating information to their constituencies.

### **Logging in to the Web Collaboration Site**

Only those who are authorized have access to this site. Log in to the forum, click on the “login” button, which is the last button in the right top side of the page. The page will be reloaded and will look very similar to the page before you logged in. The difference is that now you will be able to post new messages and files.

### **Changing your Personal Information**

If you would like to change your personal information or your login password, click on the “profile” button, which is the second button in the right top side of the page.

### **Posting Messages and Files in the Web Collaboration Site**

Once you are logged in, you will be able to post messages and files in the forum. The links that you see are called “Categories” in the forum context. You will click on the category to which you wish to add material. You can also attach files to the topic. To attach files, click on the “Attach File(s)” button at the bottom of the topic. A pop up box will appear. You will browse your computer until you find the file that you want to upload. Select the file and click on “Upload File.” Then, you will select the file and click on “Attach File.” Now, the pop up will close and the file’s name will appear in the Attachments text box. You will click on “Post Message” to finish.

Please note the following:

- Whatever the file’s name is will be the link to that file. You cannot have a different title for the file other than what the file is named.
- Files should be in PDF format only.
- Executable files should never be uploaded and will be deleted when found.
- File names should contain only alpha-numeric characters. Spaces should not be used. Underscores may be used instead.

### **Editing Topics**

To edit topics, you must be the “Originator” or author of that topic. You will log in and click on the category and topic you wish to edit. After entering the topic, you may click on the “Edit” button in the bottom left of your screen. You will then be able to change the topic title, message, and files. You may delete the files or add new ones.

# **NDIA Social Computing Guidelines**

## *Blogs, wikis, social networks, virtual worlds and social media*

### **Winter 2014**

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## **I. Purpose**

These guidelines are designed to provide helpful, practical advice—and also protect both NDIA social media participants and NDIA itself, as the association and its subsidiary affiliates, together with the chapters, embrace social media in an effort to serve our members and our mission. Given that the public view of content, whether from an “official” or “unofficial” social media platform can be attributed to NDIA, having guidelines and controls in place to preclude “misrepresentation”, or unlawful or objectionable material is imperative. New forms of social media emerge everyday. This document is designed to include all forms of future social computing, social media tools and sites currently in use, and is expected to evolve as the use of social media emerges. These guidelines are applicable to the whole of the NDIA organization and the affiliates, hereinafter referred to as NDIA. Business Center responsibility for guidance review, concurrence, and revisions is with Business Operations.

## **II. Introduction**

### **1. Responsible engagement in innovation and dialogue**

Whether or not an NDIA staff member or NDIA constituent chooses to create or participate in a blog, wiki, online social network or any other form of online publishing or discussion is both a personal and organization decision, given the nature of the various communication platforms, their general use, and value to the business interests and mission of the association. However, emerging online collaboration platforms are fundamentally changing the way NDIA staff or members work and engage with each other, members, vendors and partners.

NDIA is increasingly exploring how online discourse through social computing can empower NDIA staff or members as global professionals, innovators and citizens. These individual interactions represent a new model: not mass communications, but masses of communicators. Therefore, it is very much in NDIA's interest—and, we believe, in each NDIA staff member or constituents interest—to be aware of and participate in this sphere of information, interaction and idea exchange:

**a. To learn:** As an organization that advocates the highest level of technologies for our warfighters and first responders, we believe in the importance of open exchange, professional networking and knowledge sharing—between NDIA and its members, and among the many constituents of our emerging organization. The rapidly growing phenomenon of user-generated web content—blogging, social web-applications and online networking—are emerging as important arenas for that kind of engagement and knowledge sharing. We believe that the open and ethical exchange of information that we provide through our organization can expand beyond the walls of our meeting rooms and events to better serve the needs and expectations of our members.

**b. To contribute:** NDIA and its affiliates make important contributions to the defense industry, to the nation, to the future of business and technology, and to government and industry dialogue on a broad range of issues. It becomes increasingly more important for NDIA and NDIA employees or members to share with our members and potential members, information about our membership, events and overall industry.

NDIA is making a strategic decision to embrace social computing and to encourage NDIA staff and members to participate in a way that consistently serves our mission in a responsible, ethical and enthusiastic manner. From a day to day business perspective that means using social media

in ways that are consistent with and maximize the effectiveness of NDIA's marketing strategy. A basic rule is that the use of NDIA's name or content without written permission is prohibited.

### **III. NDIA Social Computing Guidelines: Executive Summary**

1. Know and follow NDIA's Ethical Standards and Philosophy of Operation as outlined in NDIA's Staff Policy Handbook.
2. Participation in any social computing forum must be conducted in coordination with your immediate supervisor and with the knowledge of your business center director. For chapters approval is at the Chapter President level. For divisions approval is at the chairman level in coordination with the appropriate NDIA business center director.
3. NDIA supports open dialogue and the exchange of ideas. However, NDIA regards online discourse as primarily a form of communication and relationship among individuals. When the Association as a corporation wishes to communicate publicly as a corporation—whether to the marketplace or to the general public—it has well established means to do so. Only those officially designated by NDIA have the authorization to speak on behalf of the Association.
4. NDIA believes in dialogue among NDIA staff or members and with our members, clients, members of the many communities in which we participate and the general public. Such dialogue is inherent in our business model of information sharing and collaboration within the defense industry, and in our commitment to the promotion of our national security. We believe that NDIA staff or members can both derive and provide important benefits from exchanges of perspective.
5. One of NDIA's core values as discussed in training with the Pacific Institute is "trust and personal responsibility in all relationships." As an association, NDIA trusts—and expects—NDIA staff or members to exercise personal responsibility whenever they participate in social media. This includes not violating the trust of those with whom they are engaging. If and when members of NDIA's Communications, Marketing, Sales or other functions engaged in advocacy for the company have the authorization to participate in social media, they should identify themselves as such.
6. What does an NDIA staff or volunteer's personal responsibility mean in online social media activities? Online social media enables individuals to share their insights, express their opinions and share information within the context of a globally distributed conversation. Each tool and medium has proper and improper uses. While NDIA encourages all of its staff to join a global conversation, it is important for NDIA staff or members who choose to participate to understand what is recommended, expected and required when they discuss NDIA-related topics, whether at work or on their own time.

An important aspect to consider in using social media , is that what is posted is for the world to see, and not necessarily for just a special social media grouping.

7. Staff and members will not participate in any activity that would threaten NDIA's non-profit 501(c)(3) exemption designation. Such activities include:
  - a. The posting of defamatory and offensive material
  - b. The posting of price or price-related topics
  - c. Posting of material that infringes on another's intellectual property rights
  - d. Posting of material that is partisan or could be considered an endorsement of any candidate or political parties position
  - e. Postings that encourage or discourage doing business with one or more entities
8. NDIA staff or members are **personally responsible** for the content they publish on blogs, wikis or any other form of user-generated media. Be mindful that what you publish will be public for a long time—protect your privacy, NDIA's privacy and the privacy of your fellow constituents.
9. Identify yourself— by name and, when relevant, your role at NDIA—when you discuss NDIA or NDIA-related matters. And write in the first person. You must make it clear that you are speaking for yourself and not on behalf of NDIA.
10. Be aware of your association with NDIA in online social networks. If you identify yourself as an NDIA employee or volunteer, ensure your profile and related content is consistent with how you wish to present yourself with colleagues and clients and adheres to the guidelines set forth in the staff policy handbook.
11. If you publish content to any website outside of NDIA and it has something to do with work you do or subjects associated with NDIA, use a disclaimer such as this: "The postings on this site are my own and don't necessarily represent NDIA's positions, strategies or opinions."
12. Respect copyright, fair use and financial disclosure laws.
13. Don't provide NDIA's or another's confidential or other proprietary information. Ask permission to publish or report on conversations that are meant to be private or internal to NDIA.
14. Don't cite or reference members, partners or suppliers without their approval. When you do make a reference, where possible link back to the source.
15. Respect your audience. Use common sense. Don't use ethnic slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in NDIA's workplace. You should also show proper consideration for others' privacy and refrain from

discussing topics that may be considered objectionable or inflammatory or jeopardize our non-profit status—such as politics and religion.

16. Find out who else is blogging or publishing on the topic, and cite them if they support our mission.
17. Don't pick fights, be the first to correct your own mistakes, and don't alter previous posts without indicating that you have done so.
18. Try to add value. Provide worthwhile information and perspective. NDIA's brand is best represented by its people and what you publish may reflect on NDIA's brand.
19. Intellectual Property: Materials and content created by the staff are considered property of NDIA and will be appropriately quality controlled and vetted. Staff must be certain that the copyright to all materials posted is either owned by NDIA or by an individual or entity that has provided a valid, continuing license to the material to be posted and used by NDIA. Staff should routinely obtain, in writing, broad written copyright licenses and/or transfers from authors, speakers, committee members, consultants, vendors, etc. A preferred approach, rather than reproducing others works, is to link to the web page that contains the work.
20. Staff will take prompt corrective action on the aforementioned items with appropriate notification/coordination with their Business Center Director.
21. Platform Application: NDIA participation will be under the following categories:
  1. Official NDIA Site: There are 2 types of NDIA official sites, one is static and one is dynamic with user generated content such as discussion forums. See paragraph 22 on Official Site Formation. Official sites need to be administered on a daily basis and there must be a goal oriented strategy and resources in place to actively support day-to-day administration. Please refer to NDIA's Terms of Use (TOU) Document in the Annex for guidelines that must be included and agreed upon by all Official NDIA site participants.
    - a. Official Static Site: Content created by NDIA, no outside interactive content contribution to static areas of the site. Primary purpose is to provide information, direct traffic to NDIA.org and subordinate sites or market product line only
    - b. Official Dynamic Site - Open Discussion Forums: User contributions or discussion forums must be vetted through an approval workflow and must have an NDIA approved disclaimer absolving NDIA of any responsibility for content posted in that area and must have a link to an administrator's email address for prompt removal if any content is found questionable by any participant. These type sites must be monitored on a frequent basis and appropriate measures must be taken by the site administrator to prevent any unlawful or malicious content from being posted on the site. Multiple administrators must be put in place to allow for redundancy in the event that action is needed to maintain the integrity



of the site. Resources must be in place to authenticate participants in a timely fashion if the site is a closed site or group.

2. Un-official Site

- a) NDIA is not the administrator. The site is volunteer or third party driven, and discussion forums will be considered as self contained, and will be under an NDIA licensing agreement, as provided in the Annex, for the use of any NDIA marks or content.
- b) If you participate, you are under NDIA business rules.
- c) Sites must display a link to the NDIA Social Media Disclaimer, (annex 4).
- d) If sites require authentication, administrators must respond within 72 hours or risk losing the privilege of using the NDIA logo or derivative of NDIA name
- e) No unofficial site may name their group or page “National Defense Industrial Association” (examples of allowable names include NDIA Washington Chapter, NDIA Networking Group etc.)

22. Official Site Formation: Official sites will be formed for the purposes of supporting the NDIA mission, with site formation and final approval by the NDIA President based on completing the following steps:

- a. Defining business objectives
  - primary objectives
  - results expected
  - relationship to other marketing and communication activities
- b. Defining target audience - current and future
- c. What platform(s) and communication messages
  - Participation rules
  - Monitoring/screening/corrective action requirements strategy
- d. Intellectual property issues
- e. Resource and organization/department issues
  - Staff and financial
  - Department responsibilities
  - Information/CMS Systems interaction/requirements
- f. Measurement of Objectives
  - Approaches
  - Metrics
  - Feedback channels

**IV. NDIA Social Computing Guidelines: Detailed Discussion**

**a. NDIA's Staff Policy Handbook provides the foundation for NDIA's policies and guidelines for blogs and social computing.**

The same principles and guidelines that apply to NDIA staff or members' activities in general, as found in the NDIA Staff Policy Handbook, apply to NDIA staff or members' activities online.

This includes forms of online publishing and discussion, including blogs, wikis, file-sharing, user-generated video and audio, [virtual worlds](#)\* and social networks.

As outlined in the NDIA handbook, NDIA fully respects the legal rights of our staff in all regions in which we operate. In general, what you do on your own time is your affair. However, activities in or outside of work that affect your NDIA job performance, the performance of others, or NDIA's business interests are a proper focus for NDIA policy.

**b. Know the NDIA Ethical Standards as addressed in the staff handbook.** If you have any confusion about whether you ought to publish something online, it is best to refrain and seek the advice of management. Pay particular attention to what may be considered proprietary information, and avoid misrepresentation and discussions regarding competitors or other defense industry associations.

**c. Be who you are.** Some bloggers work anonymously, using pseudonyms or false screen names. NDIA discourages anonymous participation in blogs, wikis or other forms of online participation that relate to NDIA, our business or issues with which the company is engaged. We believe in transparency and honesty. If you are blogging about your work for NDIA, we encourage you to use your real name, be clear who you are, and identify that you work for NDIA. Nothing gains you more notice in the online social media environment than honesty—or dishonesty. If you have a vested interest in something you are discussing, be the first to point it out. But also be smart about protecting yourself and your privacy. What you publish will be around for a long time, so consider the content carefully and also be judicious in disclosing personal details.

**d. Be thoughtful about how you present yourself in online social networks.** The lines between public and private, personal and professional are blurred in online social networks. By virtue of identifying yourself as NDIA staff or volunteer within a social network, you are now connected to your colleagues, managers and even NDIA's members. You should ensure that content associated with you is consistent with your work at NDIA. If you have joined NDIA recently, be sure to update your social profiles to reflect NDIA's guidelines.

**e. Speak in the first person.** Use your own voice; bring your own personality to the forefront; say what is on your mind.

**f. Use a disclaimer.** Whether you publish to a blog or some other form of social media, make it clear that what you say there is representative of your views and opinions and not necessarily the views and opinions of NDIA. At a minimum in your own blog, you should include the following standard disclaimer: "The postings on this site are my own and don't necessarily represent NDIA's positions, strategies or opinions." It is also necessary that you link to the NDIA Social Media Disclaimer, (annex 4), on the NDIA website under the resources tab.

**g. Managers and executives take note:** This standard disclaimer does not by itself exempt NDIA managers and executives from a special responsibility when participating in social media. By virtue of their position, they must consider whether personal thoughts they publish may be misunderstood as expressing NDIA positions. And a manager should assume that his or her team will read what is written. A public blog is not the place to communicate NDIA policies to NDIA staff.

**h. Respect copyright and fair use laws.** For NDIA's protection and well as your own, it is critical that you show proper respect for the laws governing copyright and fair use of copyrighted material owned by others, including NDIA's own copyrights and brands. You should never quote more than short excerpts of someone else's work. And it is good general blogging practice to link to others' work. Keep in mind that laws will be different depending on where you live and work.

**i. Protecting confidential and proprietary information.** Social computing blurs many of the traditional boundaries between internal and external communications. Be thoughtful about what you publish—particularly on external platforms. You must make sure you do not disclose or use NDIA confidential or proprietary information or that of any other person or company in any online social computing platform. For example, ask permission before posting someone's picture in a social network or publishing in a blog a conversation that was meant to be private.

**j. NDIA's business performance.** You must not comment on confidential NDIA financial information such as NDIA's future business performance, business plans, or prospects anywhere in world. This includes statements about an upcoming quarter or future periods or information about alliances, and applies to anyone including conversations with analysts, press or other third parties (including friends). NDIA policy is not to comment on rumors in any way. You should merely say, "no comment" to rumors. Do not deny or affirm them—or suggest either denial or affirmation in subtle ways.

**k. Protect NDIA's members, business partners and suppliers.** Members, partners or suppliers should not be cited or obviously referenced without their approval. Externally, never identify a member, partner or supplier by name without permission and never discuss confidential details of any business engagement. Internal computing platforms may permit suppliers and business partners to participate so be sensitive to who will see your content. If a member or supplier hasn't given explicit permission for their name to be used, think carefully about the content you're going to publish on any internal social media and get the appropriate permission where necessary.

It is acceptable to discuss general details about kinds of projects and to use non-identifying pseudonyms for a constituent (e.g., member 123) so long as the information provided does not make it easy for someone to identify the constituent or violate any non-disclosure or intellectual property agreements that may be in place with the constituent. Furthermore, your blog or online social network is not the place to conduct confidential business with a constituent.

**l. Respect your audience and your coworkers.** Remember that NDIA is a global organization whose staff and constituents reflect a diverse set of customs, values and points of view. Don't be afraid to be yourself, but do so respectfully. This includes not only the obvious (no ethnic slurs, personal insults, obscenity, etc.) but also proper consideration of privacy and of topics that may be considered objectionable or inflammatory—such as politics and religion. For example, if your blog or network is identified in any way with NDIA, avoid these topics and focus on subjects that are business-related. If your blog is self-hosted, use your best judgment and be sure to make it clear that the views and opinions expressed are yours alone and do not represent the official views of NDIA. Further, blogs, wikis, virtual worlds, social networks, or other tools hosted outside of NDIA's protected Intranet environment should not be used for internal communications among fellow staff. It is fine for NDIA staff or members to disagree, but please don't use your external blog or other online social media to air your differences in an inappropriate manner.

m. **Add value.** NDIA's brand is best represented by its people and everything you publish reflects upon it. Blogs and social networks that are identified with NDIA should be used in a way that adds value to NDIA's business. If it helps you, your coworkers, our clients or our partners to do their jobs and solve problems; if it helps to improve knowledge or skills; if it contributes directly or indirectly to the improvement of NDIA's offerings, processes and policies; if it builds a sense of community; or if it helps to promote NDIA's Values, then it is adding value. Though not directly business-related, background information you choose to share about yourself, such as information about your family or personal interests, may be useful in helping establish a relationship between you and your readers, but it is entirely your choice whether to share this information.

n. **Don't pick fights.** When you see misrepresentations made about NDIA by media, analysts or by other bloggers, you may certainly use your blog—or join someone else's to point that out. Always do so with respect, stick to the facts and identify your appropriate affiliation to NDIA. Also, if you speak about a competitor, you must make sure that what you say is factual and that it does not disparage the competitor. Avoid unnecessary or unproductive arguments. Brawls may earn traffic, but nobody wins in the end. Don't try to settle scores or goad competitors or others into inflammatory debates. Here and in other areas of public discussion, make sure that what you are saying is factually correct.

o. **Be the first to respond to your own mistakes.** If you make an error, be up front about your mistake and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so.

p. **Use your best judgment.** Remember that there are always consequences to what you publish. If you're about to publish something that makes you even the slightest bit uncomfortable, review the suggestions above and think about why that is. If you're still unsure, and it is related to NDIA business, discuss it with your manager. Ultimately, however, you have sole responsibility for what you post to your blog or publish in any form of online social media.

q. **Don't forget your day job.** You should make sure that your online activities do not interfere with your job or commitments to customers.

\*Virtual worlds present a number of unique circumstances, not all of which are covered in these guidelines. If you can be identified in any way as having an affiliation with NDIA in a virtual world, then all guidelines expressed in the NDIA Staff Policy Handbook apply to your appearance and behavior in a virtual world.

### **Social Networking Strategy and tactics**

NDIA's overall social networking strategy revolves around the use of social networking tools and websites to further NDIA's mission. Social networking tools and websites should be used only to promote NDIA events, membership, membership related content, government policy information and National Defense Magazine. While participating in social networks that identify the participant as affiliated in any way with NDIA, users must be certain that extreme care is given to maintaining the highest level of professionalism while staying true to NDIA's mission, ethical standards, and business objectives.

### **Specific Tools and website tactics**

## **LinkedIn**

LinkedIn is an online networking site for professionals to share business related information, find out about upcoming events, promote or discover business and job opportunities and get answers to questions related to their line of business from experts or peers. LinkedIn requires that users log in using their real names and affiliate themselves with their current and past employers. Using LinkedIn for marketing purposes is highly personal and not only is it a reflection on NDIA, it is also a reflection on the individual. Screen names or aliases are not used on LinkedIn. LinkedIn uses the individual's actual name for all online interactions.

## **LinkedIn Groups**

There are many professional "groups" on LinkedIn related to all areas of interest and professional development. NDIA LinkedIn users can search for groups that discuss topics related to the events or areas of interest that fall within their marketing responsibility. Once groups are identified, it's best to join the groups with the most members to reach the largest number of individuals with a discussion post. These groups provide NDIA marketers with a highly targeted group of individuals that are eager to consume content that is relevant to their interests. It is important that posts within these groups are carefully crafted to ensure that they are relevant and that NDIA is represented professionally.

LinkedIn users can promote events, membership and participate in discussions as long as they adhere to the NDIA social media policy (specifically section IV).

Users may start an unofficial LinkedIn group upon approval of the **NDIA Social Networking Approval Application**. **These groups require a disclaimer in the group profile with a link to the NDIA Social Media Disclaimer.**

## **LinkedIn Events**

LinkedIn provides an area where any member can add an event to the overall LinkedIn calendar and users can indicate whether or not they plan to attend. It is important that users update events that they post to LinkedIn when new information becomes available. This is a great opportunity for free exposure to NDIA events.

## **Twitter**

[www.Twitter.com](http://www.Twitter.com) is an information resource that is updated every second on just about any topic imaginable. Millions of people, organizations, and businesses use it to discover and share new information.

On Twitter, anyone can read, write and share messages of up to 140 characters. These messages, or Tweets, are public and available to anyone interested in them. Anyone can search Twitter and discover the Tweets that you have written. Twitter users can also subscribe to your messages by following your account. Followers receive every one of your messages in their timeline, a feed of all the accounts they have subscribed to.

When you Tweet information that is relevant to a targeted audience and remain consistent with the quality of information and frequency of distribution, then this audience begins to trust you as an information source and will grow as a direct result of that trust.

## **How can NDIA leverage Twitter?**

NDIA users can quickly share information, gather market intelligence and insights, and build relationships with people who are interested in our mission and our events. Often, there will be a

conversation about something that relates to a particular division or event currently being discussed Twitter.

**IT IS REQUIRED THAT ALL TWITTER ACCOUNTS HAVE THEIR OWN UNIQUE EMAIL ADDRESS THAT REFLECTS THE NAME OF THE TWITTER ACCOUNT BEING DEVELOPED. PLEASE COORDINATE WITH THE NDIA DIRECTOR, NETWORK & SYSTEMS, TO DEVELOP THIS EMAIL ADDRESS AND REDIRECT ALL EMAIL TRAFFIC TO THAT TWITTER ACCOUNT ADMINISTRATOR. TWITTER USERS MUST LINK TO THE NDIA SOCIAL MEDIA DISCLAIMER IN THEIR PROFILE.**

**The overall strategy for NDIA and affiliate Twitter users is to develop an account that services a particular division (or specific area of the defense industry). Then use that account to communicate to individuals that may be interested in NDIA's events and membership and encourage them to participate.**

NDIA employees must complete the **NDIA Social Networking Approval Application and establish a dedicated email account** (as referenced above in all capital letters) to begin participating in twitter as a promotional tool for NDIA. After this account has been established, the account owner will work with their team to determine information that is relevant to their target audience. Then distribute that information via "Tweets" on a regular basis.

National Defense magazine articles and official Department of Defense websites are the recommended resources for targeted information to "tweet" or distribute to NDIA twitter audiences. Using any other non-NDIA or non-government website should be considered only after thorough review of that website's content to ensure that it is inline with NDIA's ethical standards and mission. It is important to distribute targeted/timely information to ensure that the NDIA Twitter account is considered useful to the target audience. Event promotional information such as confirmed speakers, topics, locations and dates should be distributed intermittently with other magazine articles and online news to achieve a balance between targeted news and NDIA promotion. The more frequently relevant content is distributed, the more potential a twitter account has in generating followers.

A document called "NDIA\_Twitter\_assistance" has been created and is available in the "Social Networking" folder on the "I" drive for assistance in developing tweets that are targeted to specific divisions or events.

In order to reduce the amount of characters used by a long link or url, NDIA recommends the use of a [www.Bit.ly](http://www.Bit.ly) account as part of your Twitter strategy. By registering and logging into the [www.Bit.ly](http://www.Bit.ly) website, users will not only be able to shorten a long URL, but will also be able to track how many people clicked on the link in their Tweet.

Use the Twitter search function to find influencers in the market that you are targeting, then follow these influencers.

In addition to [www.Bit.ly](http://www.Bit.ly), NDIA also has tested and recommends the use of the application "TweetDeck" to monitor Twitter and to distribute Tweets. Contact the NDIA DIRECTOR, NETWORK & SYSTEMS to install TweetDeck on your computer.

Quick review:

- Determine if one Twitter account can service several similar divisions or interest groups
- Develop a Twitter account name that is descriptive of your topic (NDIA\_Small\_Arms)



- Establish an email account to service this Twitter account ([NDIASmallArms@ndia.org](mailto:NDIASmallArms@ndia.org))
- Submit **Social Networking Approval Application**
- Upon approval, register your approved username with Twitter and add a link to the NDIA Social Media Disclaimer in your profile
- Develop a series of Tweets to be able to use for staggered distribution (use NDIA\_Twitter\_assistance form if needed)
- Tweet similar content to standard emails -
  - registration
  - deadline updates
  - each time a keynote speaker is confirmed
  - whenever topic/theme is set in stone
- Tweet announcements for future events in a save the date format
- Search [www.nationaldefensemagazine.org](http://www.nationaldefensemagazine.org) , post a Tweet directing followers to the article online using [www.Bit.ly](http://www.Bit.ly) link
- Search DoD websites for news and relevant content to tweet  
<http://www.defense.gov/RegisteredSites/RegisteredSites.aspx>
- Search related past event brochures for companies that spoke, sponsored, or were involved in some other way, to follow online.
- Search keywords found in presentation titles to find organizations or people supporting that topic, follow these individuals
- Track number of click-throughs using bit.ly for pockets of interest , focus your future tweets on the content that generates the most click-throughs
- Tweet at certain times of day to reach east coast and west coast
- Monitor twitter account for direct messages and replies, delete any content that may be viewed as inappropriate

## Youtube

[www.YouTube.com](http://www.YouTube.com) YouTube allows billions of people to discover, watch and share originally-created videos. YouTube provides a forum for people to connect, inform, and inspire others across the globe and acts as a distribution platform for original content creators and advertisers.

NDIA leverages YouTube to distribute video content on everything from corporate membership, to stem to conference and exhibition promos. The overall NDIA YouTube strategy is to expose new audiences to NDIA's membership and events by using testimonials and event footage. At this time all NDIA manages two YouTube channels, NDIAToday and NTSAToday. These channels currently do not allow viewer input or open discussions however, videos may be watched and shared openly.

NDIA staff can work with the AVP, Marketing to promote their events on these channels.

#### **Annex A: OnLINE Forums terms of USE (TOU)**

**[Introduction, and whether this TOU will be provided in a click-wrap format, will vary.]**

Welcome to the **[Name on-line forum area.]** ("Online Forum"). This TOU seeks to encourage prudent use of and applies to all users of the Online Forum.

Accordingly, please read the following TOU carefully as well as NDIA's Terms of Service for this Web site because when you access and/or use the Online Forum (as made available on the [www.ndia.org](http://www.ndia.org) Web site), you acknowledge that you have agreed to abide and be bound by the terms and conditions of this TOU and NDIA's Terms of Service.



**RESPONSIBILITY FOR USE.** At all times, you agree to conduct your on-line activities on the Online Forum in a cordial and friendly manner and in accordance with this TOU and all applicable laws. Any views or opinions expressed by you on the Online Forum are your personal views or opinions and do not reflect the views or opinions of NDIA.

**USER OBLIGATIONS.** When you use the Online Forum, you promise to provide true and accurate information. You also understand and agree that use of the Internet and the Online Forum is solely your decision and at your own risk. NDIA is not responsible for the security of any information transmitted via the Internet, the accuracy of the information contained or presented on the Online Forum, or for the consequences of any reliance on such transmission and/or information. You must make your own determination as to these issues.

**RIGHT TO USE.** The Online Forum is provided by NDIA as a resource for you and to further the [mission] of NDIA. [Purpose may vary.] Access to and use of the Online Forum is therefore limited to your personal use and to NDIA's [mission-related communications, promotion, and other activities]. You do not have any right to distribute further the Online Forum (or any part or content presented on the Online Forum) without NDIA's prior written permission.

**PROPRIETARY RIGHTS.** You have no proprietary interest in the Online Forum, and this TOU provides only a limited license to use its features. You have no right to identify or suggest an affiliation with or endorsement by NDIA and/or its policies or services. The Online Forum is Copyright © 200 [ ] National Defense Industrial Association [and/or its licensors]. All rights reserved.

**ENFORCING SECURITY.** NDIA wishes to keep the Online Forum as a safe and productive resource for all. You therefore have no reasonable expectation of privacy while using the Online Forum because NDIA reserves the right to view, monitor, and/or record activity on the Online Forum and to comply with government or court appointed authorities when necessary. NDIA also reserves the right at any time when warranted to suspend or terminate operation of or access to the Online Forum or any portion of the Online Forum.

**POSTINGS.** The Online Forum provides the opportunity to share knowledge and post other helpful or meaningful information. By submitting information of any type (a "Posting") to the Online Forum or by otherwise using the Online Forum to transmit or display information, you automatically grant NDIA the royalty-free right to use this information for any purpose. You also acknowledge that your submissions are non-confidential for all purposes, and you represent that you have all rights and permission necessary to submit, display, or make available any content in your Posting. Moreover, you agree that by using the Online Forum you will not post or transmit any of the following materials on the Online Forum:

- anything, which interferes with or disrupts the Online Forum
- anything, which is contrary to the interests of NDIA
- anything, which may damage, lessen, or harm the goodwill or reputation of NDIA and its services,
- anything, which defames, harasses, threatens, offends, or in any way violates or infringes on the rights of others,
- anything, which violates any law or encourages anti-competitive or unlawful pricing behavior,
- anything, which involves the impersonation of any other person or entity,
- anything, which is inaccurate, off-topic, irrelevant, or inappropriate for the purposes of the Online Forum, and
- anything, which constitutes junk mail, spam, or unauthorized advertising.

As the Online Forum is generally public, the user experience is enhanced if you follow these guidelines. Please also use netiquette. Please be succinct and on-topic. Please remember to respect others and their opinions. NDIA encourages open and sincere communication, but urges all users to remember that Online Forum is intended to be a resource for all.

**NO PRE-SCREENING OF YOUR POSTINGS.** NDIA is not responsible for monitoring or moderating the Online Forum to the extent NDIA itself does not post or display the information through its authorized channels and processes. NDIA therefore encourages you to use reasonable discretion in using the Online Forum. NDIA also does not endorse, oppose, or edit any opinion or information provided by you or another person or entity on the Online Forum. Any views expressed on the Online Forum do not necessarily reflect the views of NDIA. Nevertheless, NDIA reserves the right to delete, edit, or take other appropriate action with respect to the Online Forum (or parts thereof), including, without limitation, terminating your access or use, that NDIA believes in good faith violate this TOU and/or are potentially unlawful or harmful to NDIA and/or other persons or entities.

**COPYRIGHT; DESIGNATED AGENT FOR NOTIFICATION OF CLAIMS OF INFRINGEMENT.** [Requires registration with the U.S. Copyright Office.] NDIA respects the intellectual property rights of others, and it asks you to do the same. Accordingly, it is NDIA's policy to respond appropriately to a notice of alleged infringement that complies with U.S. Copyright Law. If you believe that one or more of your works have been copied or used in a way that constitutes copyright infringement, please provide a written notice of your claim of copyright infringement that is directed to NDIA's designated agent as specified below along with the following information:

- A signature of a person authorized to act on behalf of the owner of the copyright interest that is allegedly infringed;
- A description, in reasonable detail (including any applicable URL address), of the copyrighted work that you claim has been infringed;
- A description, in reasonable detail, of where the material that you claim is infringing is located on the Online Forum;
- Your address, telephone number, and e-mail address;
- A statement by you that you have a good faith belief that the disputed use is not authorized by the copyright owner, its agent, or the law; and
- A statement by you, made under penalty of perjury, that the above information in your written notice is accurate and that you are the copyright owner or authorized to act on the copyright owner's behalf.
- **Designated Agent:** [REDACTED]

**LINKS TO OTHER SITES.** If links to other sites on the World Wide Web are provided or made available through the Online Forum, please note that these sites have not necessarily been reviewed by NDIA and are maintained by third parties over which NDIA exercises no control and for which NDIA will not be responsible. Please also note that these links do not imply an endorsement by NDIA of any other site, product, service, person, cause, campaign, or information.

**DISCLAIMER.** THE NDIA FORUM IS PROVIDED ON AN "AS-IS" AND "AS AVAILABLE" BASIS WITHOUT ANY WARRANTIES AND MAY INCLUDE ERRORS, OMISSIONS, OR OTHER INACCURACIES.

**LIMITATION OF LIABILITY.** NDIA SHALL NOT BE LIABLE FOR ANY INDIRECT, PUNITIVE, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES ARISING OUT OF OR IN ANY WAY CONNECTED WITH THE USE OF THE ONLINE FORUM. NDIA's MAXIMUM LIABILITY FOR ANY REASON SHALL BE LIMITED TO THE AMOUNT PAID BY YOU FOR USE OF THE ONLINE FORUM.

**GOVERNING LAW.** This TOU has been made in and will be construed and enforced in accordance with the laws of the Commonwealth of Virginia as applied to agreements entered into and completely performed in the Commonwealth of Virginia. A printed version of this TOU and of any related notice given in electronic form shall be admissible in judicial or administrative proceedings.

**CHANGES.** Please note that NDIA reserves the right to change the Online Forum and/or its features (although NDIA doesn't have any obligation to do so) as well as the terms and conditions of this TOU. Your continued use of the Online Forum following any announced change will mean that you

have accepted any change to the Online Forum and/or to this TOU. So, we encourage you to review this TOU on a periodic basis.

CONTACT INFORMATION. If you have questions regarding this TOU and/or the Online Forum, including, without limitation, any requests to use any blog entry for other purposes, please contact \_\_\_\_\_@ndia.org.

#### **NATIONAL DEFENSE INDUSTRIAL ASSOCIATION LICENSING AGREEMENT**

THIS AGREEMENT, effective as of the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_, by and between: The NATIONAL DEFENSE INDUSTRIAL ASSOCIATION (hereinafter called “Owner”), a corporation organized and existing under the laws of the District of Columbia, and located at 2111 Wilson Boulevard, Arlington, Virginia 22201, and \_\_\_\_\_ (hereinafter called “User”), located at \_\_\_\_\_.

WHEREAS, OWNER is the owner of the trademarks and service marks, such as logos(hereinafter called the “Marks”) and content of the various websites of NDIA and its affiliated subsidiaries (NTSA, AFEI, PSA, WID), hereinafter referred to as NDIA and other registrations thereof, as applicable to this agreement, as listed on Schedule A hereto, and WHEREAS, USER is desirous of using the said Marks and content in connection with their social networking activities on the World Wide Web;

NOW THEREFORE, in consideration of the foregoing and of the mutual promises hereinafter set forth, the parties agree as follows:

1. GRANT OF LICENSE.: OWNER grants to USER a nonexclusive, nontransferable license to use the Marks and content and USER accepts the license subject to the following terms and conditions.

2. OWNERSHIP OF MARKS: USER acknowledges the ownership of the Marks and content in OWNER, agrees that it will do nothing inconsistent with such ownership and that all use of the Marks and content by USER shall inure to the benefit of and be on behalf of OWNER. USER agrees that nothing in this License shall give User any right, title or interest in the Marks and content other than the right to use the Marks in accordance with this License and User agrees that it will not attack the title of OWNER to the Marks or attack the validity of this License.

3. **QUALITY STANDARDS:** USER agrees that the nature and quality of all services rendered by USER in connection with the Marks, all goods sold by USER under the Marks, and all related advertising, promotional and other related uses of the Marks by USER shall conform to standards set by and be under the control of OWNER.

4. **QUALITY MAINTENANCE:** USER agrees to cooperate with OWNER in facilitating OWNER's control of such nature and quality, to permit reasonable inspection of USER's operation, and to supply OWNER with specimens of all uses of the Marks upon request.

5. **FORM OF USE:** The USER may use the Marks only in a professional manner. The Marks may never be used independent the following disclaimer statement, "This page is not the official [www.ndia.org](http://www.ndia.org) Web page and is not published, reviewed, endorsed, or approved by The National Defense Industrial Association (NDIA)." A link must also be provided to the NDIA online Social Media Disclaimer found under the resources tab of [www.NDIA.org](http://www.NDIA.org). Notwithstanding the foregoing,, the Marks may not be used in any manner that, in the sole discretion of NDIA: discredits NDIA or tarnishes its reputation and goodwill; is false or misleading; violates the rights of others; violates any law, regulation, statute, or other public policy; or mischaracterizes the relationship between NDIA and the USER, including but not limited to any use of the Marks that might be reasonably construed as an endorsement, approval, sponsorship, or certification by NDIA of the USER and the USER's social networking activities. The USER further agrees to use the Marks only in the form and manner and with appropriate legends as prescribed from time to time by OWNER, and not to use any other trademark or service mark in combination with any of the Marks without prior written approval of OWNER.

6. **INFRINGEMENT PROCEEDINGS:** USER agrees to notify OWNER of any unauthorized use of the Marks by others promptly as it comes to USER's attention. OWNER shall have the sole right and discretion to bring infringement or improper use proceedings involving the Marks.

7. **TERM:** This Agreement shall continue in force and effect for the period that the USER is an NDIA member in good standing, unless sooner terminated as provided for herein.

8. **TERMINATION FOR CAUSE:** OWNER shall have the right to terminate this Agreement upon thirty (30) days written notice to USER in the event of any breach of any of the provisions herein by USER.

9. **EFFECT OF TERMINATION:** Upon termination of this Agreement, USER agrees to immediately discontinue all use of the Marks and content and to cooperate with OWNER in ensuring that all rights in the Marks and content and the goodwill connected therewith shall remain the property of OWNER.

10. **INTERPRETATION OF AGREEMENT:** It is agreed that this Agreement may be interpreted according to the laws of the Commonwealth of Virginia and the United States of America.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed as of the day and year first above written.

OWNER, NATIONAL DEFENSE INDUSTRIAL ASSOCIATION, by:

\_\_\_\_\_, as its Vice President, Advertising

USER: \_\_\_\_\_, by:

\_\_\_\_\_

as its \_\_\_\_\_.

Schedule A: Other registrations applicable to this agreement as follows: If none additional, indicate none.

1. None

2. \_\_\_\_\_

3. \_\_\_\_\_

National Defense Industrial Association by:

\_\_\_\_\_

Date: \_\_\_\_\_

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## NDIA Social Networking Approval Application

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*Overall Goal: Use this area to outline the overall goals and purpose for your participation in social computing as related to NDIA or NDIA affiliates. For examples please see Annex C-1.*

*Tools used: Use this area to describe the specific tools being used to achieve your overall goals. For examples please see Annex C-1.*

**Account name:**

**Email account associated with login:** please see Director, Network & Systems for a unique NDIA email address for social media accounts other than LinkedIn.

**Password:**

**Webpage:**

**Purpose:**

**Results Expected:** Use this area to describe the specific results that you expect to see after engaging in the social computing activities described above. For examples please see Annex C-1.

1. While participating in these groups as an NDIA employee and/or while using NDIA or NDIA affiliated terms in my user name, I agree to all parameters outlined in the NDIA Social Computing Guidelines document.

2. I am **personally responsible** for the content I publish on blogs, wikis, social networking websites, discussion boards and forums, list serves and any other form of user-generated media. I am aware that what I publish will be public for an indefinite amount of time I will protect my privacy, NDIA's privacy and the privacy of NDIA's fellow constituents. I will adhere to the guidelines outlined in NDIA's Social Computing Guidelines.

STAFF NAME/SIGNATURE \_\_\_\_\_  
DATE \_\_\_\_\_

SUPERVISOR NAME/SIGNATURE \_\_\_\_\_  
DATE \_\_\_\_\_

BCD NAME/SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_  
Provide completed copy to VP Business Operations for recordkeeping.

Any and all National Defense Industrial Association related social media pages are intended for informational purposes only. By participating on an NDIA related social media page, you agree to comply with the following guidelines.

Visitors to NDIA Social media pages may post views and opinions in reaction to our materials if NDIA allows user contributions. Any content, views, opinions and/or responses to questions uploaded, expressed or submitted by the creators, sponsors, advertisers or users of social media, including on its "walls," web pages, message boards and groups or otherwise communicated through it, other than the content provided by NDIA, are solely the views, opinions and responsibility of the person submitting them and do not necessarily reflect the opinions of NDIA. NDIA is not responsible for content that third parties publish, post, upload, distribute, disseminate or otherwise transmit via social media.

NDIA does not warrant the accuracy, completeness or usefulness of the information available on any social media pages. Any reliance you place on such information is strictly at your own risk. We may include links to other web pages, but these links are not an endorsement of those pages. NDIA is not responsible for the content of any web site not operated by NDIA.

All opinions and comments should contribute to the dialog. NDIA does not condone any form of harassment, written attacks, insults, vulgarity or indecency whether perpetrated in writing or the transmission of images. You agree **not** to do any of the following: (1) upload to or transmit using social media any defamatory, indecent, obscene, harassing, violent or otherwise objectionable material, or any material that is, or may be, protected by copyright, without permission from the copyright owner; (2) use social media to violate the legal rights (including the rights of publicity and privacy) of others or to violate the laws of any jurisdiction; (3) misrepresent an affiliation with any person or organization; (4) upload to or transmit on social media any advertisements or solicitations of business; (5) upload or otherwise transmit files that contain a virus or corrupted data; (6) collect information about others (including e-mail addresses) without their consent; (7) upload files or photos or include in a comment links that you know, or have reason to believe, cannot be distributed legally using social media or that you have an obligation to keep confidential; (8) engage in any other conduct that restricts or inhibits anyone's use or enjoyment of social media, or which, as determined by NDIA, may harm NDIA or visitors to social media or expose them to liability.

NDIA reserves the right, but does not assume any responsibility, to edit or delete any material it deems inappropriate for its Social media pages and its visitors or terminate any user's ability to

access its social media page. However, NDIA can neither review all material that is posted on the page nor ensure prompt removal of objectionable material. Accordingly, NDIA assumes no liability for any action or inaction regarding transmissions, communications or content provided by third parties. NDIA has no liability or responsibility to anyone for performance or nonperformance of the activities described in this paragraph.

Your failure to comply with these guidelines may result in the termination of your access to NDIA social media pages.

UNDER NO CIRCUMSTANCES WILL NDIA BE RESPONSIBLE OR LIABLE IN ANY WAY FOR ANY CONTENT, INCLUDING BUT NOT LIMITED TO, ANY ERRORS OR OMISSIONS IN THE CONTENT, OR FOR ANY LOSS OR DAMAGE OF ANY KIND INCURRED AS A RESULT OF ANY CONTENT COMMUNICATED ON ITS SOCIAL MEDIA PAGES, WHETHER BY NDIA OR A THIRD PARTY. IN NO EVENT SHALL NDIA BE LIABLE FOR ANY SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS ARISING OUT OF OR IN CONNECTION WITH THE AVAILABILITY, USE OR PERFORMANCE OF ANY INFORMATION COMMUNICATED ON ITS SOCIAL MEDIA PAGES.