HANDBOOK FOR OFFICERS OF SPECIAL INTEREST GROUPS (SIGs) OF THE COMPARATIVE AND INTERNATIONAL EDUCATION SOCIETY

CIES Bylaws can be found here: https://cies.us/wp-content/uploads/2024/04/CIES_const_bylaws3-10-2024.pdf

I. INTRODUCTION AND OVERVIEW OF CIES, SPECIAL INTEREST GROUPS

1. Comparative and International Education Society (CIES) Special Interest Groups (SIGs) provide a forum for the involvement of individuals drawn together by a common interest, such as in a field of study or geographic region. The initial decision to introduce SIGs occurred in 2004 under the Presidency of Kassie Freeman, with the first SIGs approved in 2005/2006. The goals of SIGs include enhancing the comprehensiveness and diversity of CIES by promoting new research, collaborative opportunities, and mentoring early-career researchers. SIGs also provide a platform for continuing long-term engagement in research interests and allow members to assume an active role in CIES during and between Annual and regional meetings. Membership is open to all paid CIES members through membership dues. SIGs and their members are required to adhere to the Constitution and By-Laws of CIES and to this Handbook. CIES membership is non-refundable. Dues paid for SIG membership are non-transferable.

II. THE SIG OVERSIGHT COMMITTEE

SIG Oversight Committee shall advise the Board of Directors on all issues about SIGs of the Society, including the approval of new SIG petitions and SIG requests and issues. The SIG Oversight Committee shall have two Co-Chairs and up to six additional regular members (each serving a 2-year term). The CIES President appoints a Board Member to serve a two-year term, first as a regular committee member and then as a Co-Chair. The second Co-Chair will be elected by SIG Officers (Co-chairs and Secretary/Treasurer) for a two-year term. To provide continuity, it is encouraged for (but not limited to) current oversight committee members to nominate themselves for the Co-chair position. Any outgoing or current SIG officer may be nominated to run for the Co-chair position. The SIG Oversight Committee Chairs are responsible for selecting the remaining members of the committee, who shall be current SIG officers or have served as a SIG officer within the last two years. One committee member shall be appointed as Secretary.

III. ESTABLISHING A NEW SIG

1. Per the CIES Bylaws, “Any group of 30 or more active CIES members may petition to establish a SIG” (CIES Bylaws, Article V).
2. The process of establishing a new SIG is:

a. A petition including the required information from at least 30 current CIES members who are in support of the SIG is sent to the SIG Oversight Committee Chair (Appendix 1) by April 30th. No funds are collected with this petition.

b. The SIG Oversight Committee reviews proposals and ensures they meet all requirements before forwarding its recommendation and the petition to the CIES Board by July 31st.
c. The Board of Directors approves or rejects and may seek modifications to new SIG petitions by December 31st.
d. SIGs approved by the Board of Directors are officially accepted into the Society at the next Annual Meeting, where they formally elect officers and hold their first business meeting.

CHANGE IN SIG STATUS AND TERMINATION

1. **Change in Status and Termination:**
   A SIG may petition the SIG Oversight Committee to change its name, combine with another SIG, or disband. The SIG Oversight Committee shall review these requests and will present these petitions and their recommendations to the Board of Directors for final approval.

2. **SIG Inactive Status:**

   A SIG will be considered inactive when:
   a. SIG membership falls below 30 for two consecutive years.
   or
   b. SIG fails to elect its three required officers for two consecutive years,
   or
   c. the SIG fails to prepare a program for the Annual Meeting or execute assigned submission reviews in preparation for the Annual Meeting.

   Once in inactive status, the SIG Officers or others appointed by the SIG Oversight Committee are responsible for submitting a two-year plan to reinstate the SIG into good standing, to be approved by the CIES SIG Oversight Committee. The SIG Oversight Committee, in conjunction with SIG leadership, may recommend that the SIG be disbanded, combined with another similar SIG, or reorganized. All changes to the status of a SIG require final approval from the CIES Board of Directors.

IV. SIG LEADERSHIP AND RESPONSIBILITIES

1. **SIG Officers.** Each SIG will have a minimum of three elected officers: two chairs (i.e., Chair and Vice-Chair, or Chair and Chair-elect), and a Secretary/Treasurer. The SIG may elect additional officers based on its needs, such as adding Co-Chairs, splitting the Secretary-Treasurer role into separate positions, and/or designating SIG members to various other officer roles, including SIG Program Committee, Awards Manager, Webmaster, Communications Manager, etc. There is no limit to the number of officers, provided the minimum number (3) is met.

2. **Elections and Terms.** SIG Officers in the Co-Chair and Secretary/Treasurer roles are to be elected to staggered terms of two or three years. SIGs may determine the term length of additional elected officers. Elections are organized by the Office of the Executive Director (OED) and held online within six weeks after the Annual Meeting.

   SIGs should establish leadership succession procedures in their bylaws. There are two systems to govern SIGs.

a. Individual Officer Election Model: officer elections are staggered to ensure the sustainability of SIG management. For instance, if an SIG has two Co-Chairs, they should be elected in alternating terms. This method requires at least a two-year term in office. Elections for other positions can also be staggered.

b. The election of other officers can follow either of these two systems, which will depend on the size and complexity of the SIG. The election model the SIG chooses shall be specified in its bylaws. If an elected position becomes vacant outside the election cycle, the OED will support the SIG to hold elections, and the SIG shall document the situation and process conducted in its Annual Report (see IV.9 below). If an elected SIG position becomes vacant, SIG leadership will need to notify the OED within 2 weeks of the vacancy. OED will then support the SIG with outreach and support for finding a replacement, as needed. Written communication between the SIG and OED is required for this transition process. Each SIG should make best efforts to meet all election deadlines. CIES members may not self-appoint into a SIG leadership role.

Note on Bylaw Amendments. If SIG's leadership aims to amend SIG bylaws, changes should be voted on by all active members of the SIG, following a procedure like that used for elections.

3. **SIG Chairs** (Co-Chairs, Chairs-Elect, and/or Vice Chairs)-are responsible for coordinating monitoring all \ activities of the SIG.

These responsibilities include, but are not limited to:

a. Represent the group at meetings during the CIES Annual Meeting and throughout the year.
b. Communicate with the OED.
c. Coordinate SIG officer elections.
d. Complete and submit the SIG Annual Report and Budget for the following year after the Annual Conference, within six weeks after the annual conference (Appendix 2).
e. Coordinate and track activities of the SIG.
f. Prepare for the CIES Annual Meeting, including:
- Appoint and/or organize the election of the SIG Program Committee/Program Chair(s) (see section IV.5 and VII.1).
- Coordinate with the Program Committee/Program Chair(s) the peer review process of the paper/poster/roundtable proposals.
- Organize with the Program Committee/Program Chair(s) highlighted regular panels and related sessions from among the accepted proposals.
- Communicate with the CIES Program Committee (Annual Meeting Organizers) to indicate the results of the evaluation of proposals.

g. Plan the agenda, with the Secretary/Treasurer, for the business meeting during the Annual Conference.
h. Submit signed payment/reimbursement request form(s) to the OED with complete information and accompanying documentation to cover SIG expenses (refer to OED annual reports for allowed expenses).

4. **SIG Secretary-Treasurer** is responsible for:
   a. Maintain and produce meeting minutes at the CIES Annual and other official SIG meetings and include a list of attendees.
   b. Plan Business Meeting at the Annual Meeting with the SIG Chairs.
   c. Monitor SIG's finances.
   d. Maintain, in collaboration with the OED, the historical archives of the SIG (annual reports and other relevant documents).
   e. Managing and updating the SIG website and/or social media outlets unless otherwise assigned.
   (CIES offers micro pages to SIGs that are managed by the OED. This does not preclude SIGs from having their website).

5. **Program and Nominations Committee(s)**:

Each SIG shall either have a Program and Nominations Committee or shall have both (with the below responsibilities a.-c. delegated to the Program Committee and d.-e. delegated to the Nominations Committee.

SIG nomination processes must follow the CIES Conflict of Interest for Awards and Nominations Committees found in the Society Bylaws.

A SIG's Program and Nominations Committee is responsible for:

- Receiving paper/panel, poster, and/or roundtable proposals from the respective conference organizers.
- Organizing and completing the peer review of proposals.
- Organizing highlighted and regular panels and related sessions from the accepted proposals.
- Selecting the nominees for SIG officer elections according to the process determined by the SIG.
- Sending the position(s) up for election and term(s), names, short biographies (100 words), and statements (100 words) of nominees for SIG officer elections to the OED.

The program committee will consist of one or two Program Chairs or Unit Planners. who shall coordinate the evaluation and preparation processes with peer reviewers. The evaluation of proposals is double-blinded. The Program Chair/Unit planner position description must be specified in the SIG's handbook/bylaws. The Nominations Committee must also be specified in the SIG's handbook/bylaws.

6. **SIG Awards.**

SIGs may distribute up to two (2) awards each year. SIGs with more than two awards shall consult with the SIG Oversight Committee on award sustainability. All SIG award winners should be reported to the OED by February 1st. SIG Awards, which distribute funds, will include a sustainability plan in their Annual Report (Appendix 2). New awards must be approved by the CIES Board of Directors. SIG Award Committees and processes must follow the CIES Conflict of Interest for Awards and Nominations Committees found in the Society bylaws. Awards should be announced widely, including through CIES Weekly Announcements.

7. **SIG Publications.**
Any publications to members in addition to newsletters must be approved by the CIES Publications Committee and Board of Directors.

8. **SIG Agreements/Contracts with External Partners:**
All SIG agreements and contracts with external partners must be approved by the CIES Board of Directors or by an entity delegated by the Board. These agreements should be administered through the OED.

9. **Delegation of SIG Leadership.**

When a SIG official is unable to complete their responsibilities, another official shall represent the SIG on their behalf. In the event of the resignation of a SIG officer, another SIG member may be appointed by the other SIG officers to complete the term in consultation with the SIG Oversight Committee. SIGs can also run special elections for vacant positions with support from the OED.

V. MEMBERSHIP

1. **SIG Status and Membership.** SIG membership requires current CIES membership. To remain an active SIG in good standing, a minimum of thirty active members must be paid members of the SIG as of December 31 each year.

2. **Annual Member Fee.** The annual SIG membership fee is USD $10 per person.

3. **SIG Fiscal Year.**

SIG membership dues are counted on the same fiscal year as the Society's membership dues (from January 1st through December 31st of each year). A CIES member may pay for membership in advance and/or for more than one year.

4. **SIG Funds:**

The SIG Oversight Committee has an annual budget. The disbursement form is available in PDF form on the CIES website. The form must be completed and submitted to accounts@cies.us Funds can be used to organize special sessions, receptions, or other activities that benefit the SIGs and the Society as a whole. Expenditure of SIG funds must be approved by the OED and must conform to advancing CIES' 501(c)(3) non-profit purpose. Appendix 3 is the form to request payments/disbursements.

Annual dues are established by the CIES Board, taking into consideration the costs incurred by the Society for administration, management, and oversight of SIGs. Annual Dues are $150 for SIGs up to 60 members and $300 for SIGs over 60 members. SIG: These dues are deducted from all membership fees collected before the end of the fiscal year (December 31) from money received through the CIES membership. Each SIG may access attributed funds (membership fees) minus SIG annual dues.

To access available funds, only SIG Chairs or the Secretary/Treasurer submit an advance

estimate of SIG expenses for approval by the OED (annual budget). Expenditures so identified will be paid to beneficiaries for awards or reimbursements on the basis of receipts submitted with a request that available funds are to be used for SIG-related business and program expenses, including SIG-sponsored awards, projects, and other operating expenses (Appendix 3).

SIGs should not use their funds to pay for memberships, conference registration, discounts, and/or waivers. SIGs may give awards or grants if their purpose, evaluation process, and/or reasons are well documented. Grant/award recipients and other payees should be informed by SIG officers of the required documents, information, and payment process. Payment requests should be submitted to Accounts at accounts@cies.us for review.

VI. SIG REPORTING REQUIREMENTS

1. **Annual Reports.**
   SIG Annual Reports are due to the OED six weeks after the Annual Meeting. SIGs should include in their annual report additional details such as copies of newsletters, meeting minutes, copies of webpages, and/or information about other publications that are sponsored by the SIGs. These reports should be publicly accessible on the CIES website (Appendix 2). Failure to submit an annual report shall result in SIG funds being withheld. A hold shall be placed on the SIG's account until such time that the SIG provides the annual report.

   SIG Budgets: Along with the annual reports, SIGs will submit their annual budgets for the period starting after the Annual Conference. It should include the balance from the previous year, estimated income, and planned expenses (special sessions, receptions, awards, projects and publications, external website and domain, mail, or other activities). Appendix 3 includes a section for annual budgets.

2. **Reporting on Membership and Financial Status to SIGs.**
   The OED will provide three reports each year (January, April, September) on SIG membership and finances via email to SIG Chairs. Interim reports may be requested from the OED.

   Member Communications.
   Additional communication options include the distribution of annual business meeting minutes, calls for papers, and other important announcements to SIG members. Announcements may be communicated via e-mail, newsletters, websites, social media, and SIG-sponsored publications. SIGs may also share member communications with the OED to send to all CIES members through Weekly Announcements.

VII. CIES ANNUAL MEETING RESPONSIBILITIES

1. **SIG Program:**
   Each SIG is required to have a Program Committee (or Program and Nominations Committee as indicated in Article IV, Section 5 above). It is the responsibility of this Committee to coordinate the SIG's Annual Meeting submission reviews and panel formation.

   The Program Committee shall have at least one Program Chair who shall serve as the SIG's Unit Planner responsible for managing the SIG within the Society's online submission software. The SIG Program Chair(s) must be regularly available via e-mail and phone for the duration of the meeting preparation process (typically six months before the Annual Meeting)

to support proposal review and panel organization.

2. **SIG Highlighted Panels and Business Meetings.**
   Each SIG in good standing (see CIES Bylaws, Section V) is allocated one Business Meeting time slot and one SIG Highlighted Panel at the CIES Annual Meeting. SIGs with 60 or more members in good standing as of July 31st of the preceding year shall have a second SIG Highlighted Panel. No SIG shall have more than two Highlighted Panels.

3. **SIG Symposia and other Special SIG Panels**.
   The SIG Oversight Committee may organize SIG Symposia or other Special Multi-SIG Panels in consultation and coordination with participating SIGs. SIG participation in these symposia and special panels shall not be considered as a SIG Highlighted Session. The SIG Oversight Committee shall try to encourage broad and innovative participation by a variety of SIGs in these symposia and special panels.

4. **Annual CIES SIG Chairs Meeting.**
   The SIG Chairs, or a duly appointed representative, are required to attend the SIG Chairs Meeting at the Annual Meeting. This meeting is held to discuss key issues related to SIGs, including providing a venue for networking between SIGs, mentoring new SIG Chairs (see Appendix 4 for advice provided from past SIG leaders for new or recently appointed/elected SIG Chairs), and discussing issues, proposals, and suggestions to be presented to the CIES Board of Directors. The agenda for the annual CIES SIG Chairs Meeting shall be drafted by the Chairs of the SIG Oversight Committee in consultation with the OED and distributed to all SIG Chairpersons in advance of the meeting.

VIII. SIG WEBSITE MANAGEMENT

1. **SIG Websites:**
   The CIES website lists SIGs by region and by topic. It also includes links to SIG micro web pages that are managed by the OED and present basic information on the SIG (description, goals, officers, membership, main activities, and online presence.) Providing current and accurate content for the SIG micro pages to the OED is the responsibility of the Secretary-Treasurer or other elected or appointed position within the SIG. SIGs can create external websites that shall have links to the micro pages on the CIES website.

2. **SIG and CIES Logos and Their Use:**
   SIGs may create a logo for their use on websites, announcements, and other media. The CIES logo must be visible on the front page of all SIG websites and be used in accordance with CIES Bylaws. Under CIES Bylaws, SIGs may also use the CIES logo online with advance approval from the OED. The CIES logo must not be altered or distorted in any way. The CIES logo can be requested from the OED. All promotion, advertising, and posting for SIG events requires advanced approval from the OED. No images, creative works, or other copyrighted materials may be used on SIG websites without express permission of the artist/author.

Appendix 1
Petition for a New CIES Special Interest Group

A. PROPOSED SIG TITLE:

_____

B. SIG Petitioners (minimum of three, maximum of five)

***Petitioner #1 Name: _**
Institution & E-mail: _
CIES Member since: _
*Petitioner #1 is primary contact during the petition process.

Petitioner #2 Name: _
Institution & E-mail: _
CIES Member since: _

Petitioner #3 Name: _
Institution & E-mail: _
CIES Member since: _

Petitioner #4 Name: _
Institution & E-mail: _
CIES Member since: _

Petitioner #5 Name: _
Institution & E-mail: _
CIES Member since: _

C. Statement of Purpose: Please attach a 500–1000-word statement describing the (1) purpose of the SIG.

(2) scope of the SIG, including connections to existing and developing academic and professional infrastructure; and

(3) how the SIG contributes to the goals and purposes of Special Interest Groups, which are:

a. to "promote new research and mentor educational researchers"[2], and

b. enhance the comprehensiveness and diversity of CIES by promoting creation and dissemination research; foster stronger collaborative opportunities between members, and offer additional mentoring opportunities for early and mid career educational researchers. SIGs allow more members to assume an active role in CIES during and between Annual Meetings."[3]

[2] CIES Bylaws, Article V, Section 1.
[3] Handbook for CIES SIG Officers, Article I, Section 1.

(4) how the SIG sees itself as distinct from or complementary with existing SIGs by:

a. identifying SIGs with which a potential overlap exists.
b. describing in what ways the newly proposed SIG sets itself apart from existing SIGs; and
c. detailing planned activities and forms of collaboration.

(5) Outline plans for SIG leadership for the first three years. Please be as specific as possible and explain your plans beyond stating that elections may be held.

D. Member Data. Collect the following information from at least 30 current CIES members:

As a member of the Comparative and International Education Society, I support the establishment of the proposed Special Interest Group (SIG),

PROPOSED TITLE_____

Petition Supporters:

Printed Name	**Signature**	**Institution and E-mail Address**	**Date**
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			

12.			
13.			

	14.			
	15.			
	16.			
	17.			
	18.			
	19.			
	20.			
	21.			
	22.			
	23.			
	24.			
25.				
26.				
27.				
28.				
29.				

30.			

Appendix 2
SIG Annual Report Template
**** This is a sample template. The OED will distribute a digital reporting form. Please contact oed@cies.us with any questions. ****

Chair(s) Name(s):	E-Mail Address:
SIG Name:	Fiscal year:

1. SIG Officers:

Co-Chair: _
Affiliation:
_____ Term
Begins/Ends: _
Email: _

Co-Chair: _
Affiliation:
_____ Term
Begins/Ends: _
Email: _

Secretary-Treasurer: _
Affiliation:
_____ Term
Begins/Ends: _
Email: _

Add additional information, if the SIG has other elected/appointed officers, such as Program Chair(s)/Unit Planner (s), webmaster, student representative, etc...

2. SIG Financial Information

a. Current calendar year financial report

Income:

SIG Membership Dues: $_____

Other Income (specify source[s]): $_____

Expenses:

SIG Annual Dues (admin.) $_____

Annual Conference Expenses (specify) $_____

Other Expenses (specify) $_____

Total Year Income: $_____

Less Total Year Expenses: $_____

SIG Ending Balance (as of 12/31): $_____

b. Next calendar year budget

Income:

Estimated SIG Membership Dues: $_____

Other Expected Income (specify source[s]): $_____

Expenses:

SIG Annual Dues (admin.) $_____

Annual Conference Expenses (specify) $_____

Other Expenses (specify) $_____

Total Expected Income: $_____

Less Total Expected Expenses: $_____

SIG Proposed Budget: $_____

3. SIG Annual Meeting Program Information

a. Briefly describe the SIG Program at the Annual Meeting, including SIG Highlighted Sessions, and the overall quality and outcomes of SIG sessions.

b. Briefly describe special speakers or symposia affiliated with the SIG at the Annual Meeting, including how the selections for participation were determined. Please attach any related announcements or printed materials.

c. Briefly describe outreach activities to the SIG membership. Check all applicable lines below.

_____SIG Website (required). Web address: _____

_____Official E-mail Updates. How frequently? _____

_____Newsletter. How many issues this year? _____

Who is responsible for the Newsletter?

_____Other. Please describe:

_____

d. Attach PDF copies in an upload:
1. Most recent business meeting minutes
2. Main/Landing page of the SIG Website (required).
3. *(optional)* Newsletters, Official Emails, or other SIG member outreach for the CIES Archives.

4. SIG Activity outside the Annual Meeting:
a. Include a brief list or description of academic or professional events, publications, collaborations, mentoring, or other activity the SIG or its members coordinated during the year. Han

5. SIG Governance:
a. Did the SIG hold officer elections? ____Yes, ____No
If yes, briefly describe the process, when they were held, and which succession model the SIG is following.
If not, briefly explain why office elections were not held.

b. Did the SIG hold its Business Meeting at the Annual Meeting? ____Yes,
____No If yes, upload minutes to this form.
If not, briefly explain why the business meeting was not conducted.

c. Did the SIG officers hold any other meetings during the year?
If yes, attach minutes to this report (optional).

d. Include any reflections about challenges with the governing structure of the SIG, its relationship with the SIG Standing Committee, budget issues, or general comments.

6. SIG Awards
Please complete the following for all awards given by the SIG during the year. a. Award Name:
b. Award Winner:
c. Description of the Award (Certificate, Monetary Prize, etc.):

a. Award Name:
b. Award Winner:
c. Description of the Award (Certificate, Monetary Prize, etc.):

a. Other Awards: NOTE: SIGs are limited to two awards per year unless consulted by the SIG Oversight Committee. SIGs need to contact CIES accounts and confirm that they are within budget before additional spending.

7. Membership
a. How many active members does the SIG have currently?

b. Please list your plan for SIG sustainability in the upcoming year if your membership is less than 30 members.

c. If your SIG is larger than 100 members, in what ways have you addressed any challenges related to members' seeking more opportunities for visibility or leadership.15
Handbook for CIES SIG Officers – Last Approved 2022

d. Any other comments on membership issues?

8. SIG Chair Reflections
Any additional comments, concerns, and suggestions from the SIG to the SIG Oversight Committee and/or CIES Board of Directors (attach additional pages if necessary.

Appendix 3
CIES SIG Funds Disbursement Request Form

SIGS may request the use of allocated SIG funds for the furtherance of their work and activities. expenditures must be in alignment with the mission and objectives of the Society. **All SIG purchases shall be sent to the OED for review** and will be checked against available allocated SIG balances. This form **must** be filled out in its entirety and digitally signed by the SIG Chair. Submit completed forms to accounts@cies.us who will check the request against your account balance and process the disbursement. Please include any supporting documentation as an additional PDF file. Requests for honoraria/awards exceeding $600 for US citizens must be accompanied by a completed W9 form (this does not apply to "awards"). Upon approval of appropriate documentation, disbursement will be sent by check in US dollars to the payee indicated. If an international wire is required, a Wire Disbursement Form must also be submitted.

SIG Name: _____

Requester Name: _____

Request Email: _____

Amount of Funds Requested: _____

Purpose of this disbursement of SIG funds:

Payee Name: _____ W-9 Required? __ Yes, ___ No
Payee Street Address: _____
Payee Telephone No: _____
Payee E-mail Address: _____

_____

SIG Chair Signature & Date

NOTES:
1. SIG disbursement requests submitted for the first time, should include a W-9 form (if the person resides in the United States). In other cases, it is advisable to include a W-8 form. 2. The preferred payment method is a wired bank transfer for which the following bank information should be included.

Comparative and International Education Society
All requests for International Wire Transfers MUST include the following:
If you have any questions, please contact accounts@cies.us

Beneficiary Name	
Complete mailing address:	

City, State, Zip	
Country	
Beneficiary Account Number (Not the IBAN)	
IBAN Number	
Beneficiary Bank Name	
Complete Address	
City, State Zip	
Country	
Swift, BIC, or ABA #	
Sort Code (if applicable)	
Intermediary Bank (if applicable)	
Complete mailing address	
City, State Zip	
Country	
Swift, Fed Wire Code or ABA #	
Beneficiary Bank Account #	

Payment Amount	
Currency	

Reference Information	
Added to the wire as comments. Please be brief as space is limited	

CIES Requestor

e-mail address & phone #

To be completed by the CIES Financial Team ONLY:
VALUE DATE (next bus. day):
Initiated By:
Date / Time:
Released By:
Date / Time:
Wire Reference #:

Proposed Amendment to Handbook for Officers of Special Interest Groups (SIGs) of the Comparative and International Education Society

X. SIG Fundraising and Funding Activities

1. **A SIG may raise money via fundraising or crowdfunding campaign to support Section activities by following these steps:**

1. SIG chairs must notify the CIES OED of their intention to pursue crowdfunding or a fundraising campaign.
2. The purpose of the crowdfunding campaign must be in line with SIG's mission.
3. SIG chairs must receive written approval from the CIES OED before launching any fundraising or crowdfunding campaign.
4. The purpose of the campaign should be clearly stated and must include a disclaimer stating that contributions are "donations" and that there is no return on investment expected or refunds.
5. The campaign must clearly state that it is being undertaken in the name of a CIES SIG.

6. Use of CIES branding, logos, or names must be consistent with CIES communication and branding guidelines.
7. The CIES OED must approve all campaign materials before launch.
8. Funds raised must be used solely for the purposes stated in the campaign.
9. A fundraising or crowdfunding platform must be reputable and approved by CIES. SIGs must consult with the CIES OED before finalizing platform selection.
10. The funds must be routed through CIES to comply with all accounting regulations. CIES will immediately credit the SIG account accordingly. SIG chairs should obtain financial account information from the CIES OED to set up the contributions on a crowdfunding site. Alternatively, the donations option will also be set up on the CIES website, with options for donations to be made through the Your Membership platform.

    A brief financial report outlining the use of funds must be submitted to the CIES OED within 60 days of fund expenditure.

    All bank fees charged related to the fundraising or crowdfunding donations will be covered by SIG.

    Donor information collected through the campaign must be kept confidential and used only for purposes related to the campaign. SIGs must not share donor data without permission.

Appendix 4

Advice from Past SIG Leaders to New CIES SIG Leaders

● As soon as you assume the position, set goals and objectives that are achievable and shared by the members of the leadership group
● Have e-meetings with your officers throughout the year to determine if objectives have been met and keep basic minutes of these meetings.
● Keep your listserv up to date. Communicate often with all members of SIG to establish networks and cohesiveness.
● Keep an updated spreadsheet of paid members by year, a contact list of potential members, and reviewers with their contact information including affiliation. This includes their affiliations.
● Use social media (Facebook, Twitter, etc.) to communicate and reach out to new members.
● Do satisfaction/suggestion surveys for SIG improvement.
● Plan your elections early so they can be effectively carried out.
● Have lobbying strategies for interacting with CIES on behalf of SIG(s). In other words, do not miss the business meetings at the Annual Meetings.
● Consider the best use of the SIG budget (awards, receptions, etc.) and the most effective benefit to membership.
● Consider mentorship and inclusion of new scholars in your activities, awards, and other operations.