

HANDBOOK FOR AFFINITY GROUP CHAIRS

October 2025

Prepared by the Leadership Development Committee

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Preface

Congratulations on your election to the position of HFES Affinity Group (AG) chair! We hope you enjoy your term. This handbook will help you become familiar with the details of your role and those of your AG's other officers.

Suggestions for changes to this edition, as well as questions and comments, may be sent to the HFES central office (see [Appendix A](#), Contact Information).

Abbreviations Used

AG	Affinity Group
COAG	Council of Affinity Groups
EC	Executive Council
HFES	Human Factors & Ergonomics Society
ORs	Operating Rules
TG	Technical Group

Some HFES Basics

HFES operates through a partnership between paid staff and HFES members who volunteer their time.

On the volunteer side, HFES is run by a group of HFES members called the Executive Council, (EC). The EC is composed of 12 individuals, each of whom serve a 3-year term. Each year, HFES members elect 4 individuals: A president, a secretary-treasurer, and two members at large. The individuals elected as president and secretary-treasurer serve one year as “elect” (e.g., president-elect), a second year in the role (e.g., president) and the third year as “immediate past” (e.g., immediate past president). At-large members also serve three-year terms, and so two are in their first year, two are in their second, and two are in their third. The role of the EC is to develop strategic goals for HFES and establish mechanisms to achieve those objectives (typically through committees, technical groups, task forces, etc.). The current composition of the EC can be found [here](#).

On the staff side, HFES is headed by an Executive Director, whose role is to implement the policies and procedures established by the Executive Council under the direction of the President and the Secretary-Treasurer. The Executive Director is supported by staff members who have defined areas of expertise. The primary staff members who support HFES are located in Washington, DC and that office is often called the “Central Office.”

The Executive Council meets with HFES staff members on a regular basis (virtually) and at least once a year in person. Those meetings are where HFES leadership makes decisions about our annual activities and budget and where they make plans for the upcoming year.

In addition to the Executive Council and staff, the activities of HFES are organized into Divisions: Scientific Publications, Technical Standards, Internal Affairs, Education, and

Outreach. The organizational chart showing the activities governed by the EC and by the Divisions can be seen [here](#). In this chart, you will see that AGs are part of the Internal Affairs Division, as part of the Council of AGs (composed of all AG chairs). The role of the Division Chair is to communicate with the committees/activities under its purview the current strategic priorities that the EC has developed and to see how the committees can contribute to those priorities.

AGs are designed to provide mutual support and a sense of community, furthering the non-political, affinity-related interests of those engaged in human factors/ ergonomics. These groups could be related to gender, ethnicity, national origin, veteran status, or other characteristics under the purview of the Diversity, Equity, and Inclusion Committee. AGs do not charge membership fees, nor do members have to be members of HFES.

The roles and responsibilities of employees of HFES and members serving on any committee/task force/etc. within HFES are governed by two documents: [Society Bylaws](#) and [Operating Rules](#) (ORs). In your role, the ORs will be more relevant to you as they outline the rules for how AGs work within HFES (see Chapter 15).

Role of the Affinity Groups

As the chair of your AG, you are automatically a member of the Council of Affinity Groups (COAG)— the body that oversees AGs and makes recommendations to HFES's Executive Council in matters regarding policy and governance of AGs. The COAG conducts activities relevant to the professional life of the members and is the coordinating body for the AGs. The COAG is the coordinating body for the Affinity Groups. It (1) provides guidance and financial or other support to the Affinity Groups, (2) identifies new areas of affinity interest, (3) encourages and supports the formation of new Affinity Groups, (4) brings Affinity Group Chairs together in a meeting/luncheon at the annual meeting, and (5) advises the Executive Council on matters of policy that involve affinity considerations. Operating Rules describing the COAG in detail can be found in [Appendix B](#) (Chapter 24). Individual AGs are allowed to develop their own operating rules. They shall not conflict with or supersede either HFES Bylaws or Operating Rules.

The COAG convenes meetings of AG chairs on a regular basis (currently once a month), either in person during the HFES Annual Meeting or by conference call at other times to discuss policy matters, solve problems, and distribute information. On occasion, the COAG will contact AG chairs on a variety of matters, including the creation of new AGs, voting, and updates from HFES.

Relationship between Affinity Groups and the Diversity, Equity, and Inclusion Committee

The Diversity, Equity, and Inclusion Committee is a committee that reports to the Executive Council. Their purpose is to support and encourage diversity, equity, and inclusiveness within the Society, recognizing and celebrating the variety of characteristics that make individuals unique. To achieve this purpose, the committee performs assessment activities and develops programs, interventions, communication, and training to improve diversity, equity, and inclusiveness within the Society. Their focus is on Society-wide policies and procedures.

Affinity Groups (AG) provide mutual support and a sense of community which further the non-political, affinity-related interests of those engaged in human factors/ergonomics. They are targeted at meeting the needs of individuals who belong to, or who are allies of, groups related to gender, ethnicity, national origin, veteran's status, or other characteristics under the purview of the Diversity, Equity, and Inclusion Committee.

The COAG chair/co-chairs appoint a DEI Committee Liaison (who may be an Affinity Group Chair, one of the COAG Co-Chairs, or neither on an annual basis.

EC DEI Statement

The Executive Council recommends that all leaders within HFES take part in an Allyship training program to become more aware of how to be an ally to all members of our Society. At this time, we are recommending two possible courses:

https://www.youtube.com/watch?v=n26sJwoC_IY or "Becoming an Ally to All" on LinkedIn Learning: <https://www.linkedin.com/learning/topics/allyship> (which requires that your organization provide access to this resource).

Current list of AGs

AG Name	Year Established	
HFE Women's Organization for Mentoring and Networking (WOMAN)	2016	The HFE Woman Group is dedicated to celebrating diversity within the society, specifically by creating an informal setting where issues related to women can be discussed. In doing this, we aim to facilitate networks where mentorship and networking with women of the society can occur so that future leaders receive the development they need.
LGBTQ+	2019	The LGBTQ+ Affinity Group exists to better serve our members who identify as lesbian, gay, bisexual, transgender, queer, gender non-conforming and their allies and supporters. This HFES affinity group has three objectives: 1. To promote diversity, inclusion and equity for the queer community within the Society, 2. To foster community between HFES members through welcoming events (at conferences and symposia), and 3. To better our world through outreach activities with HFES' partners and associated institutions.
Black, Indigenous, People of Color (BIPOC)	2020	The Black, Indigenous, People of Color (BIPOC) Affinity Group is committed to creating a community within the Society to connect thought leaders, senior managers, mid-career/young professionals and students that identify as BIPOC – including Black, Indigenous, Asian,

		Latinos and Hispanics across the globe – to enhance the recruitment, retention and professional growth of BIPOC in the HF/E field. We welcome non-BIPOC committed to use their position to serve as advocates for improving diversity equity and inclusion for BIPOC.
Disability/Chronic Illness	2021	The Disability/Chronic Illness Affinity Group is a space for networking, mentorship and advocacy within HFES for people identifying as disabled or living with a chronic health condition.
K-HFES, the Korean Affinity Group	2020	The K-HFES, the Korean Affinity Group, will promote contributions of researchers and practitioners to the fields of HF/E. It will foster diversity in the HF/E fields through more vibrant collaboration and communication among researchers and practitioners in the K-HFES as well as other affiliated organizations.

Roles of Affinity Group Officers

According to the operating rules governing AGs, the only required officer for an AG is the (Co-)Chair(s) (See [Appendix B](#)). The duties of that officer are listed in *OR § 24.4.1* and repeated below.

(Co-)Chair(s)

The AG (co-)chair(s) holds office for two calendar years and is tasked to (1) handle routine AG business, (2) run its meetings, and (3) supervise its elections. Specifically, the Affinity Group Chair(s) shall:

- Oversee Affinity Group finances (verifying the group account has sufficient funds to support activities)
- Attend COAG meetings
- Oversee all AG activities (to include sub-committees, if they exist)
- Ensure that Affinity Group activities are conducted in accordance with Society Bylaws and Operating Rules
- Schedule and run AG meetings
- Provide budget requests to the COAG Co-Chairs on an annual basis
- Provide description of AG activities to COAG chairs for the biannual progress report
- Collect and report to COAG and the HFES Diversity, Equity and Inclusion (DEI) Committee any concerns raised by their Affinity Group members to ensure continuous improvement of the Society
- Appoint or oversee election of next Affinity Group Chair(s)
- "Appoint" volunteers for AG activities

Officer Requirements

The chair of an AG must be a member of HFES and a member of the AG.

Note: Many AGs have found that leadership of an AG is often successfully operationalized by having two co-chairs, who have staggered two-year terms. With this

model, one co-chair is in their first year (junior) while the other is in their second year (senior). Each year, the senior co-chair rotates off and the junior co-chair moves into the senior position. This allows for more continuity from year to year and for the co-chairs to learn from one another.

Affinity Group Responsibilities

According to the Operating Rules, AGs have a responsibility to conduct at least 1 meeting per year to develop and carry out activities that support the purpose of Affinity Groups.

Conduct Annual Affinity Meeting

Each AG is required to conduct at least one meeting per year.

Groups that wish to provide food and/or drinks as part of their meeting may make those arrangements with the executive director. *HFES Operating Rule § 24.8* gives specific guidance pertaining to AG expenditures.

If you choose to conduct a business meeting, the AG chair would officiate; the Chair may wish to solicit agenda items from the AG membership via the community page prior to the business meeting. Typically, the agenda for a business meeting would consist of discussion of new or existing activities and programs, such as awards, meetings, membership building, and the AG's mission. If the AG has a budget, a financial overview should also be included. A suggested agenda for this meeting can be found in [Appendix E](#). All matters to be put to the vote of the AG must be done using email or an online survey tool.

Alternatively, the AG may host a social event in place of a business meeting. In this case, the AG chair will need to work with the COAG for any funds needed to support this and with the Executive Director on scheduling details (e.g., room, food arrangements, vendor payments).

Conduct Elections/Appoint Chair(s)

AG officer(s) should be elected/appointed in the **late fall** so that they can begin their term of office in January. Thus, AGs generally should begin their election/selection process in the **early fall**, taking advantage of the annual meeting to solicit nominations for officers. The community page is another vehicle for soliciting nominations.

The process for conducting AG elections is described in *Operating Rule § 24.5*. The election can be conducted through electronic voting or in person at the HFES Annual Meeting networking session. Members benefit from the opportunity to learn about each candidate through a biographical statement or other description, the parameters of which may be established by the chair. It is important to include space for a write-in candidate, especially in the case of only one nominee for a vacant office.

The election results should be sent to the Executive Director and the COAG within 1 month of the annual meeting. Please notify the HFES central office staff (see [Appendix A](#)) immediately upon receiving the election results so that records may be updated.

Some AGs may choose to appoint their next chair. If an AG chooses to appoint, rather than elect, their next Chair(s), the name(s) of those individuals shall be sent to the HFES central office staff (see [Appendix A](#)) and the COAG within 1 month of the appointment and prior to the end of the calendar year.

Ensure Smooth Transition of Officers and AG Archives

The ability of incoming officers to make a successful transition to office depends largely on the information they receive from the outgoing officer. Each AG officer should retain copies of correspondence and materials for his or her successor, and each successor should add to that archive.

Although the existence of handbooks helps to ensure continuity, there is always something to pass along to the incoming officer, such as unpublished news items, lists of regular activities, and correspondence with the COAG and HFES. This is *especially* true for existing or planned financial agreements, whether for sponsors or inter-society operations. Keep detailed notes and records!

A template has been created to help ensure a successful transition to the new AG Chair ([Appendix F](#), Handoff Template). HFES suggests that this template be completed each year and shared with the Chair-Elect and the HFES Executive Director.

Management of AG Finances

AGs needing a budget from the COAG for expenditures must work through the COAG to obtain approval for those expenditures. Funds can be requested on an annual basis. To be reimbursed for approved expenditures, AGs should send expense reports with receipts to the Executive Director (see [Appendix A](#) for contact information) or info@hfes.org. HFES recommends that expenditures be accounted for annually.

Other Potential AG Activities

Communications with AG Membership

Although the AG operating rules do not require AGs to produce newsletters, it is good practice to reach out to the AG membership on a regular basis. Communications to members might contain a current officer list with contact information, a purpose statement, a summary of the group's activities during the past time window, a description of any events being sponsored by the AG at the upcoming annual meeting, financial (budget) information for the AG, or an address from the chair. One of the privileges of the AG chair is to address the AG membership via the community page. These addresses may discuss technical issues, events and trends in the field, items of potential concern to members, and similar topics – at the chair's discretion.

HFES Connect

Every AG has its own community page on HFES Connect (<https://connect.hfes.org/home>). HFES Connect facilitates discussion among its members and sends out email notifications of the latest posts. Members can adjust their preferred email frequency for different communities (e.g., real-time vs. weekly). Discussion post authors can post across communities; however, edits and replies will not appear in other communities. An AG wishing to set-up a new online Community on HFES Connect for its group must contact HFES. We would note that people have reported difficulties using this system. In [Appendix D](#), there is a guide to using HFES Connect, developed by Jennifer Winner.

AG chairs may see a real-time count of the number of AG members by looking at their Community page. Example:



There are two ways in which an individual can be added to an HFES Community. One way is through the annual renewal process. Although AGs do not charge dues, those AGs who wish to be included in the annual renewal process will have a check box that members may select to indicate that they would like to belong. Alternatively, individuals wishing to join an AG Community may do so by signing up to join that AG Community online. In both of these scenarios, the system updates the AG member count in the respective Community. AG (co-)chairs have permission to download member rosters that include email addresses. The Central Office does not typically send membership rosters to the AGs but is happy to provide them upon request.

Web Sites and Online Platforms

In addition to using HFES Connect, it is possible to establish websites and/or online communities (e.g., LinkedIn, X) to improve communication among members and to promote themselves to nonmembers. Guidelines for establishing websites are provided [below](#). HFES Operating Rules allow AGs to engage in special activities. Below are some examples of activities that have proved informative and successful for groups in the past, and AG chairs are encouraged to share ideas for special activities by communicating with other chairs individually or via the community page.

Special Annual Meeting Programs

AGs are able to organize special sessions at HFES annual meetings. This could consist of a panel session, an annual invited address, or some other form of meeting. These programs need to be coordinated with the Technical Program Committee, through the submission of a proposal. The COAG typically organizes a panel discussion at the annual meeting, in which members of the various AGs may participate.

Membership Surveys

Periodic surveying of an AG's membership may reveal important information about members' satisfaction with the group and their changing needs for information delivery and other services. If an AG wishes to survey their members, they should construct the survey. A link to the survey can be sent to the HFES Executive Director, along with a short paragraph that can be sent out with the survey. The paragraph should indicate purpose, submission deadline, and an estimate of how long it takes on average to complete the survey. The Central Office will then distribute the survey to the AG membership. After the survey has been distributed and data collected, be sure to (a) discuss the results among the officers and (b) share the information with members on the AG community page.

Webinars

HFES Webinars are designed to provide continuing education on topics and domains aligned with interest areas of a Technical Group (TG) or Affinity Group (AG). Typically, a webinar would consist of one or more technical experts providing information through a lecture or panel session. If you are interested in submitting a topic for consideration, please complete the [Webinar Request Form](#). All submissions will be reviewed and approved by HFES staff members. The dates of currently scheduled webinars can be found [here](#) and an overview of the process can be found [here](#).

HFES is able to host roughly two webinars each month on the Society's virtual platform. If an AG wishes to host a webinar on their own virtual platform, they should still complete the [Webinar Request Form](#), noting that the use of the HFES virtual platform is not needed, to ensure that their webinar does not overlap with another being offered by the Society and to allow the Central Office to provide support in advertising the webinar. Responses to requests will be made within 48 business hours. Should questions arise, you can contact the Central Office at education@hfes.org, which is accessed throughout the day by multiple staff members.

Online Resource for Affinity Group Chairs

As a current AG chair, you have been added to the HFES [AG Chairs' Community](#) (should you discover that you are not in this Community, please send an email to info@hfes.org and ask to be added). The community facilitates communication among the AG chairs, COAG officers, and the HFES staff and allows you to connect with other AG chairs, share information with one another, ask questions, and get ideas about what other AGs are doing to engage their membership.

If your e-mail address should change at any time, please update your contact information in your HFES membership profile with your new e-mail address

Websites and Online Communities

HFES does not host websites for AGs. If an AG elects to develop a website hosted by another entity, the AG needs to provide the URL address so it can be linked to the HFES website. Please contact HFES (see [Appendix A](#)) if your site is not linked to the HFES site.

Additionally, AGs may establish communities on other social media platforms such as LinkedIn, Twitter, Facebook, and Instagram for promotion towards a wider audience. These platforms are created by the AGs and it is the responsibility of the AGs to maintain these platforms with updated information. An AG wishing to set-up a new online Community for its group must contact HFES (see [Appendix A](#) for contact information).

All AG websites and community pages are required to abide by the guidelines found on [Appendix C](#) (HFES Policies) to ensure that HFES policies, as well as laws concerning copyright and decency ([Appendix H](#)), are observed.

Example web sites and online communities can be found here:

- Websites: [Aging](#); [Children's Issues](#); [Health Care](#)
- LinkedIn: [Cybersecurity](#); [Extended Reality](#); [Surface Transportation](#)
- X (Twitter): [Extended Reality](#); [Health Care](#); [Surface Transportation](#)

APPENDIX A – Contact Information

HFES RESOURCES

For a list of the HFES staff, please visit this [page](#). If you are unsure who you need to work with on a particular issue, email info@hfes.org or call the office at the number shown below.

Mailing Address

HFES
2001 K Street NW, 3rd Floor North
Washington, DC 20006

HFES Website:	Main Email Address:
http://hfes.org	Info@hfes.org

Tel. + 1 (202) 367-1114
Fax: + 1 (202) 367-2114

APPENDIX B – Affinity Group Operating Rules

Chapter 24: Affinity Groups Operating Rules

24.1 Purpose of Affinity Groups

Affinity Groups (AG) are designed to cultivate community and belonging. As such, AGs provide mutual support and a sense of community which further the non-political, affinity-related interests of those engaged in human factors/ergonomics. These groups could be related to gender, ethnicity, national origin, veteran's status, or other characteristics under the purview of the Diversity, Equity and Inclusion Committee. Their purpose is different from that of Technical Groups (Chapter 15) and Professional Groups (Chapter 23).

24.2 Affinity Group Membership

All interested persons, regardless of Society membership or Society membership level, shall be eligible for membership in any Affinity Group.

The Council of Affinity Groups (COAG) shall verify that each Affinity Group has at least 10 Society members determined on an annual basis. Affinity Groups having insufficient membership levels can petition the Council of Affinity Groups (COAG) for an extension to meet the 10-member minimum. The Affinity Group shall have 2 years from the date on which the extension is granted to attain the required membership level. The criterion used at the reevaluation shall be the previous year's Affinity Group membership within the 2-year window.

24.3 Affinity Group Requirements

An Affinity Group shall conduct at least 1 meeting per year to develop and carry out activities that support the purpose of Affinity Groups, as defined in Section 24.1. At any time, an Affinity Group can petition the COAG for a 1-year, non-extendable waiver of any of these requirements.

24.4 Affinity Group Chair(s)

24.4.1 Affinity Groups shall have a minimum of one Chair who is both a member of the Society and a member of the Affinity Group. The Chair(s) may be either appointed or elected by the members of the Affinity Group. Their term of office shall be a minimum of 2 full calendar years. If an AG chooses to have two co-chairs, their 2-year terms shall be staggered.

The Affinity Group Chair(s) shall:

- Oversee Affinity Group finances (verifying the group account has sufficient funds to support activities)
- Attend COAG meetings to provide updates on Affinity Group activities
- Ensure that Affinity Group activities are conducted in accordance with Society Bylaws and Operating Rules
- Schedule and run AG meetings.
- Provide budget requests to the COAG Co-Chairs on an annual basis
- Collect and report to COAG and the HFES Diversity, Equity and Inclusion (DEI) Committee any concerns raised by their Affinity Group members to ensure continuous improvement of the Society
- Appoint or oversee election of next Affinity Group Chair(s)

24.5 Affinity Group Elections

If an Affinity Group chooses to elect, rather than appoint, their next Chair(s), every member of the Affinity Group may nominate and vote. The Affinity Group Chair(s) shall distribute the Call for Nominations and ballots, with support from the Central Office if desired. The election results shall be sent to the Executive Director and the COAG within 1 month of the election and prior to the end of the calendar year. If an AG chooses to appoint, rather than elect, their next Chair(s), the name(s) of those individuals shall be sent to the Executive Director and the COA within 1 month of the appointment and prior to the end of the calendar year.

24.6 How to Start an Affinity Group

Members of the Society interested in forming a new Affinity Group shall file a petition with the COAG. This petition shall indicate (1) the proposed name of the Affinity Group; (2) its purpose, objectives, activities, specific area of interest, and anticipated benefit to the Society; (3) the name of, at a minimum, one Chair who is a member of the Society, and (4) a list containing the names of individuals interested in joining the proposed group, at least ten of which must be members of the Society.

The COAG shall consider whether establishment of the proposed group is justified and not in conflict with existing Affinity Groups. Following such consideration, the COAG shall vote on the proposal and shall forward the results of the vote, along with a recommendation, to the HFES Executive Council. If the proposed group is not recommended by the COAG, the COAG chair shall provide the group with the reasons for denying their petition. If the proposed group is recommended, the Executive Council votes to disapprove, return for additional information, or approve the Affinity Group. If approved, the Society will provide space on the HFES website and access to other electronic resources.

24.7 Affinity Group Dissolution

Recommendations to dissolve an Affinity Group can be made by either (1) the majority of its members through its Chair(s) to the Executive Council, (2) two-thirds of the COAG to the Executive Council, or (3) the Executive Council itself (in consultation with the COAG). The ballots and details from (1) and (2) shall be sent to the Executive Council. Cause may be the repeated failure of an Affinity Group to meet the requirements specified in Section 24.2 or Section 24.3, or where realignment of Affinity Groups is needed (e.g., combined or split).

Failure to meet Affinity Group requirements shall be met with increasing levels of remedial intervention. For the first instance of an unfulfilled requirement, the COAG Chair(s) shall notify the Affinity Group Chair(s) of any failure and they shall work together to seek a solution. For the second instance within a 3-year period, the Executive Council shall issue a warning to the Affinity Group Chair(s), the COAG Co-Chairs, and the Affinity Group membership. In addition, the COAG Co-Chairs shall submit to the Executive Council a plan to resolve the problem and prevent it from recurring. For the third instance within 5 years, the COAG Co-Chairs shall recommend that the Executive Council dissolve the Affinity Group.

24.8 Affinity Group Finances

Any expenses incurred by the Affinity Group must be approved by the COAG. Any funds raised by an Affinity Group shall be held in accounts maintained and supervised by the HFES Executive Director. The Executive Director shall provide basic membership and financial administrative services including membership list maintenance and account balance tabulation at no cost to the Affinity Group. Any budget approved by the Affinity Group Chair(s) and details of expenditures shall be made available each year to the listed Affinity Group members affiliated with HFES.

24.9 Affinity Group Operating Rules

Affinity Groups may develop their own operating rules. If they do, the operating rules shall not conflict with or supersede Society Bylaws or Society Operating Rules.

24.10 Management of Affinity Groups

The HFES Central Office shall ensure that the Affinity Group Chair(s) have access to the list of individuals who belong to the Affinity Group. The Central Office will also provide promotion for Affinity Group webinars and social events.

24.11 Council of Affinity Groups (COAG)

24.11.1 The COAG is the coordinating body for the Affinity Groups. It (1) provides guidance and financial or other support to the Affinity Groups, (2) identifies new areas of affinity interest, (3) encourages and supports the formation of new Affinity Groups, (4) brings Affinity Group Chairs together in a meeting/luncheon at the annual meeting, and (5) advises the Executive Council on matters of policy that involve affinity considerations.

24.11.2 The COAG shall hold at least one meeting per quarter. COAG Co-Chairs shall publish and distribute an agenda to each Affinity Group Chair prior to the meeting and the minutes of the meeting after.

24.11.3 The voting members of the COAG consist of the COAG Co-Chairs, Affinity Group Chairs, and appointed DEI Committee liaison. COAG meetings are open to others.

24.11.4 In the case of a tie vote, the vote of the co-chair in their second year of office will break the tie.

24.12 Council of Affinity Group Co-Chairs

24.12.1 The Council of Affinity Groups shall have staggered Co-Chairs who are members of the Society. Their term of office shall be 2 years.

24.12.2 The COAG Co-Chairs shall (1) handle routine COAG business, (2) run its meetings, (3) supervise its elections and (4) appoint a DEI Committee Liaison (who may be an Affinity Group Chair, one of the COAG Co-Chairs, or neither). These activities include:

Routine business

- Oversee COAG finances
- Ensure that COAG activities are conducted in accordance with Society Bylaws and Operating Rules

Run COAG meetings

- Prepare the agenda for the business meetings and preside over them
- Ensure that the minutes of the meetings are distributed to the Internal Affairs Division Chair and all members of the COAG
- As appropriate, present proposed policies and procedure changes to the COAG for ratification; forward any approved recommendations to the HFES Executive Council

Supervise COAG elections

- Assure that nominations and voting for COAG Co-Chairs is conducted in a timely fashion and in accordance with these Operating Rules
- One COAG Co-Chair should be elected by the members of the COAG on an annual basis.

APPENDIX C – CALENDAR OF EVENTS



JANUARY	FEBRUARY	MARCH
• Get organized • Review handoff materials • Review website for needed updates • Work with AG leadership team to develop initiatives for the year	• Typical deadline for annual meeting submissions • Connect with TPC if the AG would like a session or meeting at the annual meeting •	• Ensure work on initiatives is happening
APRIL	MAY	JUNE
AG Chair • Ensure work on any initiatives is happening	AG Chair • Ensure work on any initiatives is happening	AG Chair • Ensure work on initiatives is happening • Complete scheduling of session(s) in HFES system, check for author conflicts • Notify all accepted authors of their presentation date/time
		General • Preliminary program available (around June 15)

JULY	AUGUST	SEPTEMBER
AG Chair • Ensure work on any initiatives is happening • Finalize program and enter session chair/co-chairs in HFES system	AG Chair • Plan and organize meeting to be held at ASPIRE (date, time, agenda) • Ensure work on any initiatives is happening	AG Chair • Finalize planning for ASPIRE meeting (including a summary of work done on initiatives)

OCTOBER	NOVEMBER	DECEMBER
AG Chair • Hold Annual Meeting of the AG at the ASPIRE meeting • Recruit new officer candidates • Discuss progress made on any AG initiative from the year • Note information that should be communicated to AG membership from the ASPIRE meeting	AG Chair • Ensure election is held for new officers (if election is needed)	AG Chair • Notify AG membership and HFES central office of new officers • Handoff of materials from the year to the incoming AG Chair
General • ASPIRE (the annual conference)		

APPENDIX D – USING HFES CONNECT/LESSONS LEARNED

AGs are encouraged to use HFES' community management tool, HFES Connect, to push announcements and opportunities to members. This method is only as effective as the members' settings are deliberate. Here is a quick guide to becoming a savvy HFES Connect user (developed by Jennifer Winner).

- Access HFES Connect here: <https://connect.hfes.org/home>
- Username and password are the same as your HFES log in.
- Once you join an AG, these should show up under the 'My Communities' list (Figure 1).
- All current members are automatically members of the main "HFES Member Forum" community.
- Clicking on the title of the AG, or the "Discussions" button on the bottom right will take you to the page to see the latest posts within that community.
- Once you're within the 'Affinity Group' option within HFES Connect, you can adjust your settings to select your preferred email frequency for receiving discussion posts (Figure 2).
- The second way to adjust preferred email settings is to access account settings via the drop-down box in the top most right section of the screen (Figure 3) and navigate to "Community Notifications" under "My Account" (Figure 4). Notification setting options may be set here (Figure 5).
- You may select different frequency of emails for different communities (e.g., real-time vs. weekly).

Figure 1. Select HFES Community email frequency.

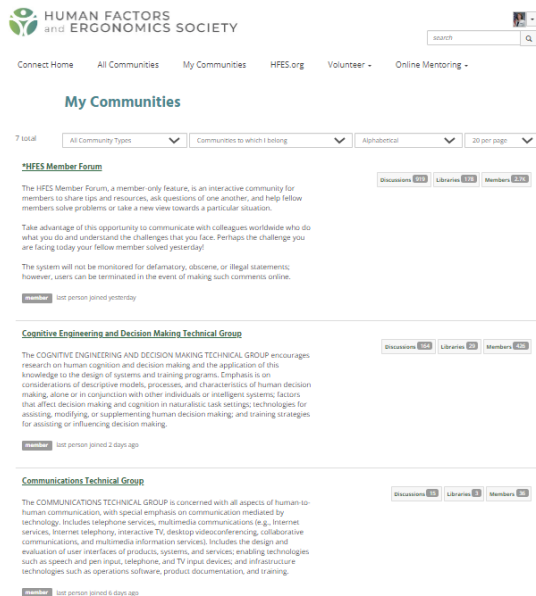


Figure 2. Select HFES Community email frequency.

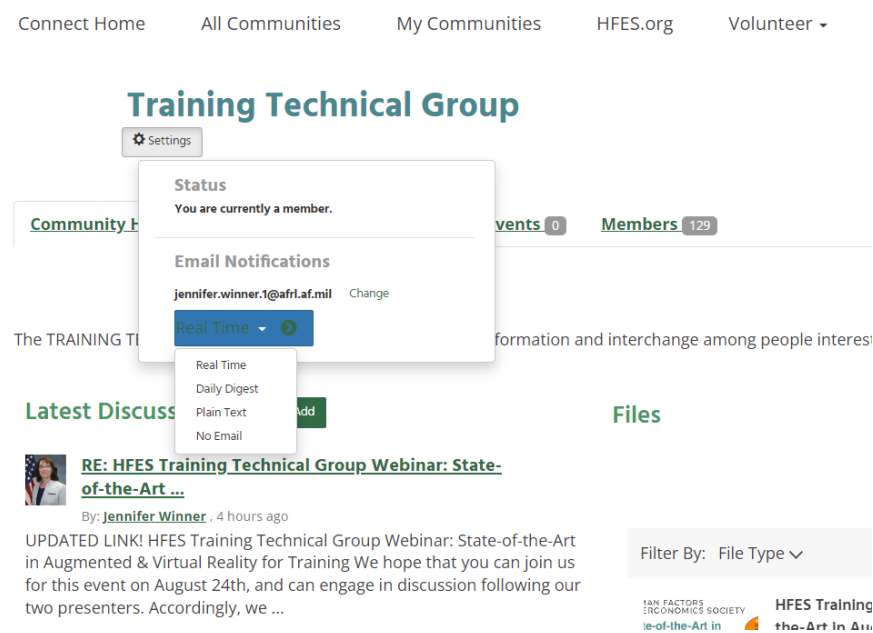


Figure 3. Access User Profile (top right corner of screen)

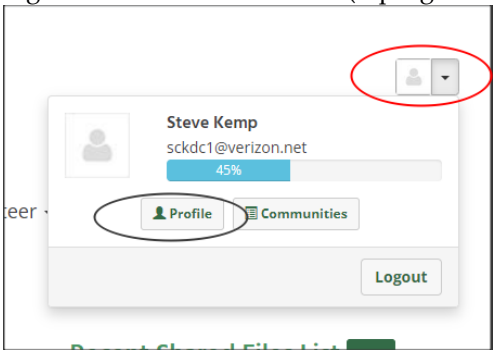


Figure 4. Modify email settings under "My Account" and then "Community Notifications"

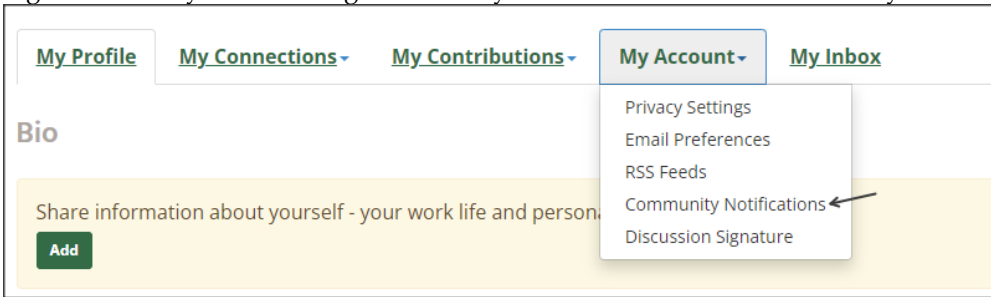


Figure 5. Community Notifications

Community Notifications

Community notification will be delivered to your primary address:

sckdc1@verizon.net

To receive specific community notifications at an address other than your primary, set override(s) where desired.

Daily Consolidated Community Digest: ⓘ
Deliver to your primary address.

Weekly Consolidated Community Digest: ⓘ
Deliver on Sunday ▾ to your primary address.

Discussion Email: ⓘ
You have no override email addresses for discussion emails. [add override addresses](#)

Notification Settings

Yes ☐

Automatically set community discussion emails to "No Email" when a community is added to a consolidated digest.

2 Communities

Community Name A-Z ▾

Community	Discussion Email	Consolidated Daily Digest	Consolidated Weekly Digest
*HFES Member Forum	Daily Digest ▾	☐	☐
Safety Technical Group	Daily Digest ▲	☐	☐

HFES Connect Posting Lessons Learned

- The community needs to be set up to allow non-members for them to receive the notifications they opt into (real time or digest). As long as this flag is set, nonmembers may join any AG and so they should be receiving emails to inform them when content is posted to the communities to which they belong.
- Authors can edit the contents of an existing post that they made, but there is no option to delete or replace attachments in those posts.
- When adding a new discussion post, you can select the optional “cross post to” option. Once posted, it will shoot out emails to members for both communities according to their email frequency settings.
- If you edit a post from the main community in which you posted it, those edits will not appear in the optional “cross post to” community. You will have to go into that second community, into the discussion post, and make those edits there also.
- If you reply to a post from the main community in which you posted it, the reply will not appear in the optional “cross post to” community discussion thread. You will have to go into that second community, to that discussion thread, and reply there also.

APPENDIX E – Annual Business Meeting Agenda Template

NOTE: AGs are not required to hold an annual business meeting; however, should you decide to do so, this template may be of use

HFES AG Business Meeting Template

1. Meeting Details
 - a. Chairperson: _____
 - b. Secretary/Minutes' keeper: _____
 - c. Date: _____
 - d. Time: _____
 - e. Location: _____
 - f. List of attendees (if desired for recordkeeping purposes)
2. Call to Order
 - a. Conducted by Chairperson
3. Old Business
 - a. Overview of the state of the AG
 - b. Review of the AG Budget
 - c. Review of the Program (from the Program Chair)
 - i. # of submissions/acceptance rate/# of sessions, etc.
 - d. If the AG does awards, they probably belong here (announcement of winners)
 - e. Revisiting points of order or issues from previous meetings
 - i. Progress on initiatives
 - ii. Note of any challenges hampering progress
 - f. Promotion of AG events at the annual meeting and beyond
 - i. Networking event
 - ii. Dedicating time for sponsors to address the membership
4. New Business
 - a. Presentation of new agenda items that have developed since the previous meeting
 - b. Breaking news of concern to the membership
 - i. For example, relevant publications
 - c. Members can ask in advance to have an item in this section
5. Any Other Business
 - a. Members have the opportunity to raise any new issues at this time (dedicated time for this purpose)
6. Adjournment
7. Filing and/or Posting of Minutes
 - a. Include note of the officer or person submitting the minutes

APPENDIX F – Handoff Template



The following be completed each year, submitted to the Executive Director, and handed off from the current AG Chair to the incoming AG chair.

Handoff Template Information

1. Committee Name
2. Committee Purpose
3. Committee Members, Position, responsibilities, and affiliations with other HFES committees
4. Meeting Frequency and date of last meeting
5. Committee Initiatives
 - a. Completed
 - i. Brief description of purpose and link to committee goals
 - ii. Roles & responsibilities
 - iii. Any issues or comments
 - b. Ongoing
 - i. Brief description of purpose and link to committee goals
 - ii. Timeline
 - iii. Roles & responsibilities
 - iv. Status
 - c. Planned
 - i. Brief description of purpose and link to committee goals
 - ii. Expected Timeline
 - iii. Roles & responsibilities
6. Other notable activities
7. Notes

APPENDIX G – HFES Policies and Guidelines for Group Websites

Policies

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

1. HFES logo, which you can obtain from HFES

For external audiences



For internal audiences



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

2. The group's name must include "HFES" or "Human Factors and Ergonomics Society," such as "Aerospace Systems Technical Group of the Human Factors and Ergonomics Society", "Arizona Chapter of the Human Factors and Ergonomics Society", or "HFES Old Dominion University Student Chapter"
3. A link to the HFES website (<http://hfes.org>) must appear on the home page.

Guidelines

1. If your website is not hosted by HFES, send the HFES staff (see [Appendix A](#)) the URL for your site. The HFES website contains links to all active TG and chapter Websites.
2. Be sure to notify the central office (see [Appendix A](#)) whenever your Website URL changes.
3. Test all the links throughout your site regularly to ensure they are still active; update as needed.

APPENDIX H – A GUIDE FOR HFES-AFFILIATED GROUPS:

Copyright, Decency and Information Dissemination

The following brief guidelines are intended to assist groups affiliated with the Human Factors and Ergonomics Society, such as chapters, technical groups, and affinity groups, with the task of responsible information dissemination.

Growth, particularly in the area of electronic information dissemination, has raised concerns about protection of intellectual property rights and issues involving suitability, appropriateness, and decency. These guidelines address such issues in regard to the distribution of information in print or by electronic means (e.g., E-mail, bulletin boards, list servers, World Wide Web).

HFES Policies and guidelines for Technical Group Websites

Copyright

Unless the author of information presented in print or electronic form explicitly states otherwise, he or she owns the information, and anyone wishing to use or redistribute it must first obtain the author's permission. Whether or not a statement such as "Copyright 2006 by John Jones" appears in the document, it must be assumed to be copyrighted. (Simply stating that a document is copyrighted establishes the ownership; it need not be formally registered with the Copyright Office.) Reuse of even a small portion of the work without permission may violate the author's copyright.

If you intend to reuse, redistribute, or upload information, you must first obtain permission unless an explicit license for reuse is included in the document. In addition, if you are redistributing or reprinting the document, the copyright owner may require that you obtain the permission of others (the author, for instance) and/or that you include a specific acknowledgment of the original source as conditions of reuse.

The Human Factors and Ergonomics Society requires that anyone wishing to reuse HFES-copyrighted material must obtain permission from the Society as well as the senior author (even if the requester is the senior author). Acknowledgment of the original source is also required.

By their nature, messages posted to publicly accessible news groups are assumed to be copyable without the need to obtain the author's permission. This is referred to as "implied license" to reuse the work. However, there are very few other instances of implied license allowing reuse of another's work without permission.

According to the Society's legal counsel, "the courts have determined that bulletin board operators having knowledge that unauthorized copies of materials may be made in connection

with the operation of the bulletin board can be held liable for copyright infringement, as well as for trademark infringement, unfair competition, and otherwise."

Antitrust and Defamation

Issues of confidentiality, privacy, antitrust, and libel can arise in electronic communication media such as bulletin boards. According to the Society's legal counsel, "antitrust violations such as 'statements that could be construed as price-fixing, boycotting of certain supplier companies or firms, or even allocation of markets among suppliers'] have been considered per se antitrust violations in certain circumstances." In addition, "bulletin board operators can be held liable as publishers of defamatory comments when controlling the content of online information. Potentially defamatory, obscene, or other improper communications can be problematic."

HFES advises that the system operator state clearly that "the system will not be monitored for defamatory, obscene, or illegal statements but that users can be terminated in the event of making such comments online."

With regard to privacy and confidentiality, "anything placed online (including E-mail) should be considered permanent and accessible and discoverable in litigation."

References

Glassie, J. C. (1996, May 21). Memorandum from the Law Offices of Jenner & Block, Washington, DC.

Lessig, L., Post, D., & Volokh, E. (1996). Cyberspace law for non-lawyers (<http://www.lessig.org/content/articles/works/cyberlessons/index.html>) (August 1996)