


# Student Chapter Handbook

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Developed by the HFES Student Affairs Committee

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# Table of Contents


Overview of Student Chapter Handbook 4

Student Chapters of HFES 4

Organizing a Student Chapter 5

- Member Recruitment 5
- Recruit a Faculty Adviser 5
- Ensure College/University Permission 5
- Develop a Constitution and Bylaws 5
- Application to HFES for Affiliation 5

How to Keep the Chapter Alive 6

- Sample Activities for Student Chapters 6
- Communicating with the Members of your Chapter 7
- Reporting Chapter Activities 7
- Election of Officers 8
- Ensure Smooth Transition of Student Chapter Officers and Records 8

Funding for Student Chapters 9

- Annual Funding Available from HFES 9
- Allowable Expenses 9
- Requesting Additional Funds 10
- How to Request Reimbursement from HFES 10
- Reimbursement Deadlines 10
- Other Sources of Funding 11

Resources for Student Chapters 11

- Awards 12

General Benefits of Student Affiliate Membership in HFES 13

- Becoming an HFES Student Affiliate Member 13
- Student Community Forum 13
- Technical Group Membership 13
- Local Chapter Membership 14
- Early Career Associate Member 14
- Career Center 14
- Annual Meeting Activities 14

Disaffiliation 15

HFES Basics 15

| | | |
|---|---|---|
| Appendix A | Where to Get Support from HFES | 16 |
| Appendix B | Sample Constitution and Bylaws | 17 |
| Appendix C | Possible Activities for a Student Chapter | 24 |
| Appendix D | HFES Student Chapter Report | 29 |
| Appendix E | Officer Roles and Responsibilities | 33 |
| Appendix F | Student Chapter Handoff Template | 35 |
| Appendix G | HFES Reimbursement Procedure | 36 |
| Appendix H | Expense Reimbursement Request Form | 38 |
| Appendix I | Student Chapter Recognition | 39 |
| Appendix J | Application for Student Chapter Recognition | 45 |
| Appendix K | Student Member with Honors | 47 |
| Appendix L | Application for Student Members with Honors | 49 |
| Appendix M | HFES Policies and Guidelines for Student Chapter Websites | 51 |

## Overview of Student Chapter Handbook

The Human Factors and Ergonomics Society (HFES) Student Chapter Handbook is designed to supply guidance and assistance to HFES student members in organizing student chapters. Support is available to you from two sources: The HFES Central Office and the Student Affairs Committee. Contact information for both sources of support can be found in Appendix A.

The Handbook supplies information for both starting new chapters and operating existing chapters. The handbook is compiled, published, and revised as necessary by the Student Affairs Committee of the Human Factors and Ergonomics Society.

This handbook is designed to supply the following information:

- Why organize a Student Chapter?
- How to organize a Student Chapter
- What resources are available to your chapter?
- What types of activities take place in Student Chapters?
- What are the general benefits of being a Student Member of HFES?

## Student Chapters of HFES

A Student Chapter of HFES is a group of students interested in human factors and ergonomics who organize to develop and execute activities for the benefit of students, the community, and HFES. The student chapter operates under the auspices of HFES and receives support from HFES for its activities.

| Benefits to Students | Benefits to Community | Benefits to HFES |
|---|---|---|
| ● Provides opportunities for professional development including finding mentors and learning about relevant research.<br><br>● Provides a forum for meeting other students, faculty, and professionals who are interested in human factors and ergonomics issues.<br><br>● Provides a student forum for discussion of school-related issues and HFES policies that affect student members.<br><br>● Enables access to funds provided by HFES to support student chapter activities such as invited speakers, colloquia, field trips, and other projects. | ● Builds a community of students who are interested in human factors and ergonomics issues.<br><br>● Provides a forum for the presentation, discussion, and investigation of human factors and ergonomics issues.<br><br>● Lowers the barrier to accessing useful information about human factors and ergonomics.<br><br>● Promotes awareness of HFES and human factors/ergonomics on campus. | ● Enhances participation in HFES.<br><br>● Encourages local participation in HFES activities by students who might not be able to attend the annual meeting.<br><br>● Encourages individuals to become student members of HFES. |

# Organizing a Student Chapter

## Member Recruitment

To start a student chapter, you must have a minimum of 15 students who are interested in joining the chapter. At least three of these students must be student affiliate members of HFES. Try to recruit students from a variety of programs on campus such as industrial engineering, engineering psychology, cognitive science, industrial/organizational psychology, occupational therapy, physiology, health, and performance, and so on.

## Recruit a Faculty Adviser

**The student chapter must have a faculty adviser who is a Full Member of HFES**. This person will provide guidance for the development of chapter activities and will help oversee expenditures related to chapter activities.

## Ensure College/University Permission

To be eligible for consideration as a student chapter, you will have to work with your faculty advisor to obtain a letter from your host-college or university stating that the proposed student chapter has permission to organize.

## Develop a Constitution and Bylaws

The constitution for the student chapter is a general statement of the purpose and affiliation of the student chapter. A sample is presented in Appendix B.

The Bylaws are the details of the name of your chapter, membership requirements, officer descriptions and duties, government, and meeting guidelines (sample in Appendix B).

The last page of the Constitution and Bylaws must include the signatures of the members who have approved the Constitution and Bylaws, the percentage of the membership they represent, and the date of approval.

NOTE: Use the models presented in the appendices and adapt them to your specific chapter. The chair of the Student Affairs Committee will assist you if you have any questions.

## Application to HFES for Affiliation

Applying to HFES for official approval of your student chapter requires that you submit the following items:

- A cover letter stating your interest in being considered for affiliation as a student chapter of HFES.
- A letter of support from the faculty adviser of the chapter.
- For the new officer roster, contact information for the chapter and a description of the calendar-year activities.
- A list of members of the prospective chapter, including the name, address, and membership class in HFES for each member.
    - Note: this list must include a minimum of 15 students plus the faculty adviser.
- A letter from the Host College or university stating that the proposed student chapter has permission to organize.
- The Chapter Constitution and Bylaws. **The last page of the Constitution and Bylaws must include the signatures of the members who have approved the Constitution**

**and Bylaws, the percentage of the membership they represent, and the date of approval.**

- A complete list of the interim or elected officials and the date of their election. **The president, treasurer, and one other officer must be HFES student affiliate members**. In the case of interim officers, a schedule for nominating, electing, and installing officers for the first year of chapter operation should also be provided.

**Send an Electronic file of these materials to the Student Affairs Committee Chair (See Appendix A for contact information).**

The Committee Chair will review the application materials and work with you to verify that the formal requirements have been met. Once the application is complete, it will be forwarded to the HFES Executive Council (EC) with the recommendation that it be approved at the next EC meeting.

## How to Keep the Chapter Alive

The goal of a student chapter is to coordinate events and activities for the benefit of the students, the community, and HFES. To achieve this, the officers are responsible for building a program of activities for the coming year; that program of activities must be shared with the Student Affairs committee. They are also responsible for ensuring that new officers are elected at the end of their term and ensuring a smooth transition to the next year. This section provides an overview of each of these activities.

### Sample Activities for Student Chapters

If your chapter is new, it may seem daunting to create a calendar of events for the upcoming year. Thus, we have created a sample schedule of events that could be held over an academic year. The template is not intended to suggest that completing these activities will guarantee any level of recognition (bronze, silver, gold); it is merely a suggestion for those who don't have experience in scheduling activities for a student chapter. A much longer list of potential activities is provided in Appendix C.

**August - September**

- Welcome party:
    - Invite all enrolled students for graduate programs by email or other electronic means; invite undergrads who are interested in human factors by flyer or electronic means.
    - Allows you to introduce faculty and students, provide an overview of what the chapter does, and encourage people to participate
        - Note 1: If your chapter doesn't have membership dues, you might just tell people that everyone is considered part of the chapter
        - Note 2: You can use this opportunity to explain the benefits of becoming a student affiliate member of HFES

**October - November**

- Invite a speaker to present to the chapter
    - Could be focused on a research topic, how to apply to grad school in HF, how to write your resume, or a tutorial on a topic not covered in classes (e.g., an R tutorial)

    - If you would like to ask someone to speak to your chapter whom you don't know, here are some ideas:
    - See if your chapter's faculty advisor knows the person (or ask them to recommend someone if you have a topic in mind, but don't know who to ask)
    - Reach out to your alumni network (most universities have emails for at least some of their alums) to see if anyone would be interested in speaking (alums often love to come back "home" to present)
    - Send an email or call the individual to ask if they would consider speaking to the chapter on topic X (or a topic related to their research). In that email, let them know why you think they would be a good speaker, and be clear about the requirements – would this be by Zoom, in person (and if so, will you pay for travel), how long you'd like them to speak, and whether an honorarium is involved. If there are specific dates you have in mind, mention that as well.
- Host a social event
    - Could be a game night, meeting somewhere on or off campus to play pool, etc.
- Develop a plan for the annual meeting
    - Schedule a social hour to connect current students to alums at the annual meeting
    - Create a list of all faculty and students who will be presenting at the meeting, along with days and times, so that people can support one another

**December**

- Holiday/End of Semester Party
    - A chance for people to relax at the end of the semester and enjoy getting to know one another

**January - April**

- Host a speaker (see ideas above)
- Host a social event
- Support or pair with a local HF chapter or local industry
    - E.g., do tours of your lab for people working in industry in your locale
    - Work with a local company to do a hack-a-thon (or a usabilithon)
    - Invite people to come talk about industry positions

**May - June**

- Host an end-of-year celebration to celebrate those graduating

## Communicating with the Members of your Chapter

Each Student Chapter is strongly encouraged to create an e-mail account with a username that can be used from year to year by incoming officers, (e.g., hfes@psu.edu). It is also useful to create a list (or listserv) of current members so that it is easy to send announcements out on that list. The Secretary is responsible for updating the membership list on an annual basis.

## Reporting Chapter Activities

It is important that the Student Affairs Committee be aware of the activities taking place within student chapters. This information helps them report to the Executive Council regularly about what events are being sponsored by student chapters and to provide general support for the

chapters. Officers are responsible for completing the bi-annual (i.e., twice a year) HFES Student Chapter Report: https://hfes.formstack.com/forms/student_chapter_report.

The incoming officers should complete this in the summer/fall based on their planned activities for the year. The outgoing officers should complete this form again in the spring based on their actual activities (see Appendix D). Should the chapter plan their activities each semester, the fall report can contain only those activities planned for the fall and the form can be completed again in February for the spring semester.

Report Deadlines:

- February 1 (or nearest first business day of February)
- September 1 (or nearest first business day of September)

## Election of Officers

Ideally, an officer transition should be strategically scheduled near the end of the last term of the academic year, which is a good endpoint for the old officers' term and the beginning of the new officers' term. The transition itself should allow adequate time for all officers to meet as a group and with their adviser.

It is critically important for the student chapter to elect new officers by the end of the spring semester so that an orderly transition can take place. The HFES Operating Rules require the following roles:

- President
- Secretary
- Treasurer
- Faculty Adviser

Other potential positions include the following:

- Vice President
- Communications Director
- First-year liaison
- Historian

The duties associated with each position are described in more detail in Appendix E.

Both the HFES Central Office (info@hfes.org) and the Chair of the Student Affairs Committee (see HFES website for current chair) should be notified of the new roster of officers within one month of their election via the HFES Student Chapter Report (and no later than the bi-annual reporting deadlines).

Note: If your chapter is also registered with your university, be sure to check that you notify them by their deadline of any new officers by their deadline.

## Ensure Smooth Transition of Student Chapter Officers and Records

The ability of incoming student chapter officers to make a successful transition depends largely on the information they receive from outgoing officers. Each officer should retain organized copies of correspondence, event materials, financial records, meeting notes, and key contacts for their successor. These materials should be stored in a shared cloud-based workspace (e.g.,

Google Workspace) that remains accessible to future leadership. Incoming officers are expected to add to this archive to maintain continuity over time.

Although bylaws and officer descriptions provide general guidance, additional materials must always be passed along, such as pending initiatives, event planning documents, sponsorship agreements, budget records, and communications with HFES or faculty advisors. This is especially important for financial commitments, co-sponsored events, or ongoing partnerships. Maintain clear and dated records throughout the year.

A structured transition document should be completed annually by each outgoing officer and shared with the incoming officer, Chapter President, and Faculty Advisor. A transition meeting should also be held to review responsibilities, deadlines, and outstanding items to ensure leadership continuity. A template has been created to help ensure a successful transition (Appendix F). This template should be completed each year and shared with the incoming officers.

# Funding for Student Chapters

## Annual Funding Available from HFES

HFES provides each student chapter with an annual allocation of up to $450 (January–December) to support chapter activities. The allocation is not automatic; funding is reimbursement-based and matched to documented expenditures up to the approved maximum. Receipts are required for all reimbursements.

All funded activities must benefit a majority of chapter members and be open to all. Funds may support a single event or be distributed across multiple events throughout the year. Chapters that have not submitted their Student Chapter Report (Appendix D) will not receive funding.

## Allowable Expenses

Expenses for student chapter program activities should be reasonable, and they must benefit a majority of the members of the chapter; that is, the goal of these funds is to support activities available to all chapter members, to enable chapter growth, and to encourage students to be active in the chapter. Eligible expenses include, but are not limited to:

- Speaker travel and related expenses (lodging, meals)
- Speaker or door prizes/gifts — must be non-monetary and valued under $50; shipping costs for virtual meetings are eligible
- Field trip transportation (e.g., car/van rental) — note that if not all members can attend, the expense may still be approved provided attendees present a report at the next chapter meeting
- Meeting room costs
- Refreshments and meals for chapter-sponsored events — food costs must not exceed $5 per person; alcoholic beverages are not eligible; include estimated attendee count when requesting reimbursement
- Design competition awards
- Books or other materials made available to all chapter members

HFES support can be used to fund refreshments, and to supplement breakfast, lunch and dinner for particular events. However, the per-person cost associated with the purchase of food for these events must be less than or equal to $5 per person. When requesting reimbursement for food items, please make sure that the estimated number of attendees is included and remember that alcoholic beverages are not eligible for reimbursement.

Expenses related to the HFES Annual Meeting are not eligible for reimbursement, including travel, lodging, and any chapter-sponsored social or networking events held during the meeting. Other means of defraying annual meeting costs — such as volunteering or institutional funding — are available.

Questions about allowable expenses can be directed to info@hfes.org.

## Requesting Additional Funds

Some years, there will be chapters that do not use all of their allocated funds. On the other hand, there are other student chapters (e.g., those that are located long distances from major metropolitan areas) that spend all their allocated funds on travel expenses for one or two speakers. To accommodate this disparity, the Executive Council has agreed that student chapters that spend the entire allocated $450 and have a need for additional funds may apply for those additional funds when that money is available. Student chapters may send the request for additional funding by October 1 to info@hfes.org

## How to Request Reimbursement from HFES

Expenditures are typically reimbursed after an event. To request reimbursement, submit all receipts and the completed reimbursement form (Appendix H) to info@hfes.org. You do not need to wait until the end of the semester or year — submitting reimbursement requests promptly after each event is encouraged.

If advance funds are needed, contact HFES headquarters at info@hfes.org and copy the Chair of the Student Affairs Committee (Appendix A). They will advise whether funds can be advanced.

## Reimbursement Deadlines

| Events Occurring | Submit Receipts By |
|---|---|
| **January 1 – May 31** | June 15 |
| **June 1 – December 10** | December 10 |

Reimbursement requests submitted after these deadlines will not be processed and the funds will be forfeited. No requests will be processed after December 10, as HFES closes its budget at calendar year end.

Please allow at least ten business days for check processing, plus additional time for mail delivery. Be sure to include the name of the payee and the mailing address for the check

Additional reimbursement guidance is available in Appendix G and Appendix H.

Very important: Please be sure to include the name of the person to whom the check should be made payable and the address to which the check should be sent.

### Other Sources of Funding

Besides HFES, there are other possible sources of funding:

- Some student chapters charge modest dues ($5)
- Numerous student chapters receive small grants from their department, college, or university

Many universities have funding that can be leveraged to supplement the funding coming from HFES. University funding for student groups might come from your university's Graduate School, your department, or from clubs and organizations sponsored by the university. Your faculty advisor should be able to point you toward the potential sources of university funding at your specific university.

## Resources for Student Chapters

Whether you have a simple question about your chapter or you're faced with a big problem, we encourage you to take advantage of the numerous people and resources available to you:

**Faculty Advisers**

Each student chapter has a faculty adviser who is a Full Member of HFES and has probably been involved with your chapter longer than you have. This adviser is your best source of wisdom, especially concerning the chapter's relationship to your university and to HFES.

1. **Chair of the Chapters Affairs Committee**
2. The Chair of the Student Affairs Committee is an HFES Member appointed by the HFES President to watch over and advocate for Student Affairs. The Chair of the Student Affairs Committee reports to the Executive Council at each of their meetings. The current Chair can be contacted about any student issue concerns (see Appendix A for contact information).

**HFES Central Office**

While your main point of contact is the Student Affairs Chair, Joann DeNardis, HFES Sr. Operations Manager, may also be contacted at jdenardis@hfes.org or info@hfes.org

**Student Chapter Presidents Luncheon**

HFES sponsors a luncheon at the Annual Meeting for individuals serving as president of their Student Chapter. The goal of this luncheon is to introduce you to your fellow presidents and create a community that you can look to throughout the year.

**Student Chapter Discord Channel**

A Discord channel was developed so that presidents of Student Chapters can communicate with one another. Student Chapter presidents can receive a link to join the channel by reaching out to Jackie Cha (Jackie.cha@wisc.edu).

**Student Chapter Community Forum**

HFES Central Office maintains a Community Forum in HFES Connect (https://connect.hfes.org) for the benefit of the student chapter presidents and faculty advisers.

Student chapter presidents and faculty advisers may join this Community Forum. This forum is separate from the Student Community Forum and is specifically designed to allow student chapter officers and faculty advisors to reach out to their counterparts at other universities.

The Community Forum may be used as a:

- Central source for general announcements relevant to the student chapters
- Opportunity to interact with other student chapter officers

### Other Student Chapters

If you were having an event, it would be nice to inform nearby chapters and invite them to participate (e.g., for invited colloquia or social events). You may also plan a field trip to visit nearby student chapters and tour their facilities. The student chapter officers' Community Forum described above will be a useful tool for communicating with other student chapters. Your fellow students are a valuable resource.

## Awards

### Student Chapter Award

Outstanding Student Chapter is a special status for Student Chapters of HFES. The purpose of this designation is to honor Student Chapters that have made outstanding contributions to the discipline, HFES, their campus, or their community. Additional details are in Appendix I. Selections are announced at the Student Reception of the HFES Annual Meeting.

**The application for the Student Chapter Award may be found in Appendix J. Requests for more information should be sent to the Chair of the Student Affairs Committee (see Appendix A for contact information).**

### Student Awards

HFES also offers a number of opportunities for the recognition of students. These include the following awards:

- **The Alphonse Chapanis Best Student Paper Award** (established in 1969 as the Best Student Paper Award, and renamed in 1983), provides a certificate and a total monetary award of $2000 to a student (or students) who present(s) the most outstanding student paper at the HFES Annual Meeting. Candidate papers are reviewed and ranked on the basis of subject-matter relevancy, methodological sophistication, clarity of written expression, and oral presentation of the material. Written papers are prescreened so that generally no more than six papers will be selected for final judging by the subcommittee during oral presentation by the student authors.

- **Student Member with Honors** is a special designation for HFES Student Affiliate Members, which honors students who have made an outstanding contribution to the discipline or HFES. Additional details are in Appendix K, and an application for this award may be found in Appendix L.

- **Student Author Presentation Support Award**, sponsored by the Council of Technical Groups and several Technical Groups, focus on students in financial need who have a paper accepted for a poster or lecture presentation at the Annual Meeting. The program is announced in the HFES *Bulletin.*

- **First-Year Student Travel Honorarium Program** helps support students entering HF/E academic programs to travel to the Annual Meeting. The honorarium requires matching funds and is designed to support first-year, non-presenting students who would not normally attend the meeting due to limited resources.

- **TG Student Awards**. Many of the technical groups sponsor student paper awards. Details of the awards are published in technical group newsletters or via their community forums each year.

## General Benefits of Student Affiliate Membership in HFES

In addition to supporting chapters, HFES supports individual students who choose to become Student Affiliate Members of the Society.

### Becoming an HFES Student Affiliate Member

Any person who is enrolled as a full-time undergraduate or graduate student at an accredited college or university and is not working full-time is eligible to become a Student Affiliate of the Society. Student Affiliates are entitled to participate in all activities of the Society except that they may not vote or hold office. Student Affiliate dues are for the period January-December and include subscriptions to *Human Factors, Ergonomics in Design*, the *Journal of Cognitive Engineering and Decision Making*, and *Proceedings of the Annual Meeting and Health Care Symposium.*

### Student Community Forum

HFES Central Office maintains a Community Forum in HFES Connect (https://connect.hfes.org) for the benefit of the students. This forum is available to all student affiliate members, and it allows you to reach out to other students who have chosen to join HFES as affiliate members.

### Technical Group Membership

HFES is divided into a number of interest groups referred to as Technical Groups (TGs). (See https://www.hfes.org/Groups-Communities/Technical-Groups for a listing and full descriptions of the TGs.)

Membership in a TG provides the opportunity to interact and network with others interested in similar technical areas. TGs produce newsletters and often maintain community forums and websites for the benefit of their members. The TGs are also responsible for the Technical Program at the HFES Annual Meeting. Many TGs have awards specifically for students.

If you wish to join a TG, simply log in as a member (https://my.hfes.org/my-account/my-profile) and click on the Technical Groups item in the left-hand menu list. Membership fees for most TGs range from $4 to $7, and one does not have to be a member of HFES or of an HFES Student Chapter to join a TG, although one must create a free account on HFES.org first.

### Local Chapter Membership

HFES currently supports 17 local chapters. (See https://www.hfes.org/Groups-Communities/Student-and-Local-Chapters for a listing of current local chapters).

Membership in a local chapter provides the opportunity to interact and network with others who work and live in your area. They are a great source of information on jobs in the area, and they typically sponsor activities throughout the year that can grow your professional network.

Local chapters do not collect dues through HFES. You will need to look at their website to determine how to join.

### Early Career Associate Member

Formerly called “Transitional Associate Member,” this membership category is for those who were active Student Affiliate Members who have completed an undergraduate or graduate degree. The specially discounted rate applies for two years following graduation (again, for those who were Student Affiliate members of HFES). This category can be selected when renewing for the next calendar year. There is no application fee, and a 50% discount off Full members’ dues applies.

### Career Center

HFES operates an Online Career Center exclusively for HFES members. Members can log in and post resumes at no charge and may apply for jobs online. The Career Center may be accessed at the HFES website at https://www.hfes.org/Education-Career-Resources/Career-Resources.

### Annual Meeting Activities

The Annual Meeting offers several opportunities for student development. These include:

- **Volunteering**. Students are invited to volunteer to assist in the Annual Meeting coordination on-site. In exchange for volunteering four or eight hours, students will be reimbursed half or the full registration fee after the meeting.

- **Student Reception.** HFES sponsors a reception at the Annual Meeting for all of the student attendees. Also invited to the reception are members of the HFES Executive Council, Student Chapter advisers, and selected faculty members. Refreshments are provided and announcements pertaining to students are made here.

- **Student Career and Professional Development Day**. HFES holds a full day of program dedicated to the professional development of student members during the annual meeting. Interactive panels and presentations focus on job search, transition and early career success, diversity, mentorship, and networking.

## Disaffiliation

There may come a time when your Student Chapter just isn't viable any longer. For whatever reason, if your Student Chapter becomes inactive or if there aren't enough students to make the

transition from one academic year to another, please contact the Chair of the Student Affairs Committee to discuss the situation. Hopefully, it can be resolved.

However, if a decision is made to close down the chapter, you must send a written request for disaffiliation to the Chair of the Student Affairs Committee. This request must be signed by a majority of the current chapter officers, and the faculty adviser and must include a copy of the notification to the membership that disaffiliation is being requested. The Student Affairs Committee will review the request and then forward it along with relevant information and appropriate recommendations to the Executive Council for decision.

In extreme cases, the HFES Executive Council may terminate the affiliation of a chapter for failure to submit annual reports for two or more years in succession, failure to comply with its own chapter Bylaws, disaffiliation with its host institution or conduct prejudicial to the interests and objectives of the Society.

## HFES Basics

Information about how HFES operates can be found here: HFES Basics.docx - Google Docs

## Appendix A Where to Get Support from HFES

For a listing of the names and contact information for the staff members of HFES, please view the online staff directory. You can also find a list of staff member responsibilities here:
HFES Staff Contact Information for Committees (1).pdf

If you are unsure who to reach out to, it is best to email info@hfes.org. People monitoring this mailbox can point you to the best person to address your questions.

In addition, the Society appoints a committee called the Student Affairs Committee, which coordinates, recommends policy for, and supports programs and services for students and student chapters.

## Appendix B Sample Constitution and Bylaws

(Bylaws updated May 202x)

Constitution

University of _____
HFES Student Chapter

The University of _____HFES Student Chapter is organized to serve the needs of the human factors profession at the University of _____. Its purpose is to promote and advance the understanding of the human factors involved in the design, manufacture, and use of machines, systems, environments and devices of all kinds through the interchange of knowledge and methods in the behavioral, biological, and physical sciences and in industrial, computer science and other relevant engineering disciplines.

The University of _____ HFES Student Chapter is established as an affiliate of the Human Factors and Ergonomics Society, Inc., a nonprofit corporation chartered by the State of California, to operate exclusively for charitable, educational, scientific, and literary purposes by authority of and in accordance with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society now in force or hereafter amended.

Bylaws

University of _____
HFES Student Chapter

**Article I - Name**

The name of this organization is "The University of _____ HFES Student Chapter".

**Article II - Purpose**

The University of _____ HFES Student Chapter, hereinafter referred to as the Chapter, is an affiliate of the Human Factors and Ergonomics Society, Inc., a nonprofit corporation chartered by the State of California. Purposes of the Chapter are those set forth in the Articles of Incorporation of the Human Factors and Ergonomics Society, Inc., hereinafter referred to as the Society.

**Article III - Membership**

**Section 1. Classes of Membership.**

The voting membership shall include Full Members and Associate Members of the Chapter.

**Section 2. Qualifications for Membership.**

a) **Full Member.** Full Members are students, faculty or staff at the University of _____ who show an interest in the field of human factors and complete the Chapter's application process.

b) **Associate Member.** Associate Members are those persons active or interested in human factors or related fields, but who do not qualify for election to the grade of Full Member.

**Section 3. Application for Membership.** Persons who wish to apply for membership shall submit a written or electronic application to the Chapter Secretary on a prescribed form. This form must include acceptable evidence of the applicant's qualifications for either member or associate status.

**Section 4. Privileges.**

a) **Members.** Members in good standing shall be entitled to vote, receive notices, participate in all activities of the chapter, receive one copy of all chapter publications, and have a hearing before termination. Only members shall be able to hold office.
b) **Associates.** Associates in good standing shall be entitled to all privileges of Membership except that they may not hold office.

**Section 5. Termination of Membership.** The membership of a person in the Chapter may be terminated at any time by voluntary resignation, or by involuntary termination by a two-thirds vote of the full Executive Council. Sufficient causes for involuntary termination include: 1) failure to pay dues for one year, or 2) conduct prejudicial to the purposes of the Chapter (for which an appeal may be made to the Executive Council, if requested in writing 30 days from receipt of notice of termination).

**Section 6. Reinstatement of Members.** Procedures and conditions for the reinstatement of members shall be established by the Executive Council subject to the requirements of the other pertinent Sections of this Article.

**Section 7. Dues.** Annual dues for membership shall be established by the Executive Council.

**Article IV – Officers Section 1. Designation.**

- President
- Secretary
- Treasurer
- Faculty Adviser

**The president, treasurer, and one other officer must be student affiliate members of HFES.**

**Section 2. Duties of Officers.** The officers of the Chapter shall perform the regular and customary duties of their offices and other duties that may be required of them by the Executive Council, Chapter Bylaws, or the Human Factors and Ergonomics Society.

a) **President.** The President shall be the chief executive officer of the Chapter and shall be a member of the Executive Council. The President shall preside over meetings of the Chapter and the Executive Council. The President shall appoint, with the advice and consent of the Executive Council, all committee chairmen not otherwise specified in these Bylaws.

a) **Secretary.** The Secretary shall keep a true and faithful record of all business meetings of the Chapter and of the Executive Council. The Secretary shall be the custodian of all records and correspondence of the Chapter and shall maintain the membership list and other mailing lists pertinent to Chapter business. The Secretary shall be a member of the Executive Council.

**b) Treasurer**. The Treasurer shall be responsible for the money and securities of the Chapter. The Treasurer shall keep a true and faithful record of all financial transactions and shall prepare the annual financial status report, which shall correspond to the same fiscal year as the Society. The Treasurer shall deposit Chapter funds to the account of the Chapter in a bank or trust company selected by the Executive Council. The Treasurer shall disburse such funds only upon approval by the Executive Council.

**c) Faculty Adviser.** The Faculty Adviser shall be responsible for the academic oversight of the Chapter. Specific duties include facilitating interactions between the Chapter and the university and communicating with the national organization as needed. In addition, the Faculty Adviser shall be responsible to initiate an impeachment process for an incumbent officer who fails to fulfill his or her responsibility to the Chapter. **The Faculty Adviser must be a Full Member of HFES.**

If your chapter would like to appoint additional officers, here are some suggested officers and their roles.

a) **Vice President.** The Vice President shall act as an understudy to the President and become acquainted with the business and operations of the Chapter. The Vice President shall assume the duties of the President during the President's temporary absence, or in the event that the President is not able to perform his or her duties, as determined by a two-thirds vote of the Executive Council. The Vice President shall be a member of the Executive Council.

b) **Communications Director**. The Communications Director shall be responsible for creating and maintaining electronic and written forms of communication within and beyond the Chapter. Such forms may include a periodic newsletter and a website. The Communications Director shall be a member of the Executive Council. See Appendix M for HFES Policies and Guidelines for Student Chapter websites.

c) **First-Year Liaison.** The first-year liaison shall be responsible for welcoming first-year students (that is, students in their first year of membership in the chapter. The First-Year Liaison shall be a member of the Executive Council.

**Article V - Executive Council**

The affairs of the Chapter shall be managed by the Executive Council, which shall consist of the elected Officers and the Faculty Adviser(s). The President shall call meetings of the Executive Council at least twice annually to administer the affairs of the Chapter (such meetings may be held in conjunction with regular chapter meetings). The chair of each standing committee shall report at these meetings.

**Article VI - Election of Officers**

**Section 1. Nomination.** At least two weeks prior to the Annual Business Meeting of the Chapter, the Chair of the Membership, Nominations and Elections Committee shall issue a call for nominations to all Members in good standing for the offices to be filled. One week after the date nomination ballots are sent, nominations from the membership shall be closed and the Executive Council shall begin to prepare the election ballot. This ballot shall include, for each office, the names of the person(s) who received the largest number of nominating votes and who are both eligible and willing to stand for that office, as determined by the Executive Council.

If any nominee is ineligible or unwilling to stand for office, the name of the person who ranks next in nominating votes, and who is eligible and willing to serve for that office shall be substituted. At a minimum, at least one nominee and space for a write-in candidate should be provided. If no nominees are identified for a given position, the Executive Council may make additional nominations.

**Section 2. Election.** After the closing of nominations, the Executive Council shall distribute the election ballot to all Chapter Members in good standing. After a suitable period to collect votes, the Executive Council shall close the election and count the votes. The candidate for each office who receives a majority of the votes cast shall be elected. Tie votes for any office shall be resolved by drawing lots. The incumbent President shall notify the winning candidates of their election and shall direct that their names be published within 45 days in any publication distributed to all Chapter members. The President shall further direct that names of the newly elected officers be forwarded to the Chair of the Student Affairs Committee and the Director of Member Services of the Society.

**Section 3. Terms of Office.** The Officers shall assume their offices on the first day after the close of the Annual Business Meeting of the Chapter following their election. They shall hold office until their successors accept office in their stead, or until the Executive Council shall have declared their office vacant as provided for elsewhere in these Bylaws. The terms of all officers shall be one year.

**Section 4. Installation.** Election results shall be announced during the Annual Business Meeting of the Chapter and the newly elected Officers installed by the incumbent Officers.

**Section 5. Impeachment.** The Faculty Adviser shall be responsible to initiate an impeachment process for an incumbent officer who fails to fulfill his or her responsibility to the Chapter. An officer may be removed from office after the impeachment process is initiated by the Faculty Adviser with a two-thirds vote of the current Executive Council. Impeachment should be considered a last resort and should only be initiated after other appropriate methods of conflict resolution have been pursued.

**Section 6. Eligibility and Vacancies**. **The President, Treasurer, and any third officer shall be a Student affiliate member of the Society**. The Chapter President may not hold more than one elective office concurrently. The Executive Council shall consider the failure of any incumbent to perform the duties of his or her office from disability or other circumstances and may decree the office vacant by a two-thirds vote. In the event that a position becomes vacant mid-term, the Executive Council may appoint an appropriate qualified member to assume the

duties of the vacant office until that vacancy is filled at the next election. The maximum number of offices that any one person may hold is two.

**Article VII – Committees**

**Section 1. Special Committees.** Special committees may be determined by the President with the advice and consent of the Executive Council. The selection of Committee Chairs, the status of each Special Committee, and the period of continuance of each Special Committee, shall be determined by the President with the advice and consent of the Executive Council. Except as otherwise provided for in these Bylaws, the Chair of each Committee shall select and appoint such Committee members as are necessary to conduct the affairs of the Committee. Chairs and other Committee Members shall normally serve from the time of their appointment until the close of the next Annual Business Meeting.

**Article VIII - Meetings**

**Section 1. Types.** There shall be Regular Meetings of the Chapter and of the Executive Council. Chapters may hold these meetings in person or electronically, with the exception of the Annual Business Meeting, which must be held in person.

**Section 2. Regular Meetings of the Chapter.** The Chapter shall hold no less than three Regular Meetings

each year. One of these shall be designated the Annual Business Meeting. The selection of the time and place of each meeting shall be designated by the Executive Council or its delegated representative for this purpose. Announcements for each meeting shall be posted not less than three days prior to the meeting date.

**Section 3. Quorum.** Fifty percent of the voting members of the Chapter present shall constitute a quorum at any Regular or Special Meeting of the Chapter. Any meeting at which a quorum is present may, by a two-thirds (2/3) vote, order the submission of any question, except one affecting the Bylaws of the Chapter, to the Executive Council or to the voting members. A quorum need not be present to adjourn a meeting.

**Section 4. Executive Council Meetings.** Meetings of the Executive Council shall be called by the President or the Faculty Adviser at least twice annually. The President may request the attendance of any Committee Chair or member to present or receive reports and recommendations pertinent to the conduct of the Student chapter’s affairs. Such meetings may be held in conjunction with regular chapter meetings. The chair of each standing committee shall report at these meetings. A simple majority of the members of the Executive Council present shall constitute a quorum.

**Section 5. Parliamentary Authority.** The rules contained in *Roberts' Rules of Order* shall govern the Chapter in all cases in which they are applicable, and in which they are not inconsistent with the Chapter or Society, or the body of standing rules or rules of order of the Chapter.

## Article IX - Fiscal Accounting

**Section 1. Accounting.** The Chapter shall keep a record of all money received and paid out on the basis of the same fiscal year as designated by the Society. Chapter funds shall be deposited to the account of the Chapter in a bank or trust company selected by the Executive Council.

**Section 2. Financial Report.** The Treasurer shall submit an annual report to the Executive Council of the Chapter and shall also present a financial status report at the Chapter's Annual Business Meeting. In addition, the treasurer shall present periodic reports at regular meetings of the Chapter. The Chapter Treasurer shall prepare reimbursement requests which include the corresponding event / activity report for submittal to the Society's Chair of the Student Affairs Committee. If requested by the Chair of the Student Affairs Committee, the Treasurer shall prepare an Annual Financial Report for submittal to the Executive Council of the Society.

## Article X - Amendments

**Section 1. Proposal.** Motions to adopt, amend, or repeal Chapter Bylaws shall be submitted in writing to the Secretary and shall bear the signatures of at least three members of the Chapter or Executive Council. Motions shall be distributed by the Secretary to the Executive Council within three days for evaluation and voting. The proposed changes shall be evaluated by the Executive Council to ascertain whether they are consistent with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society.

Members of the Executive Council shall be allowed not less than three days, nor more than seven, thereafter to return their votes.

**Section 2. Adoption.**

a) **Motions Approved by the Executive Council.** Approval of Motions to adopt, amend, or repeal Chapter Bylaws shall require a two-thirds (2/3) vote of the Executive Council. After approval by the Executive Council, the proposed change shall be submitted to the voting membership of the Chapter, either during the next meeting or by mail or electronic ballot. Motions shall be adopted if approved by a two-thirds (2/3) majority of the Chapter.
b) **Motions Not Approved by the Executive Council.** In the event that the Executive Council fails to approve a motion, a petition bearing the signatures of at least five voting members shall cause a ballot on the motion to be distributed by the Secretary within five days to all voting members of the Chapter.
c) Voting members shall be allowed not less than three days, nor more than ten days thereafter to return their votes. Voting shall be by secret ballot. Motions shall be adopted, thus overriding any contrary vote of the Executive Council, if approved by a two-thirds majority of all voting members.

**Section 3. Society Approval.** Any amendment to these Bylaws initiated by the Chapter action shall be submitted in writing within 30 days after its passage to the Chair of the Student Affairs Committee of the Society for approval or disapproval by the Executive Council of the Society.

**Section 4. Date of Effect.** Adoption, amendment, or repeal of a Bylaw shall take effect immediately upon its passage by the Chapter and approval by the Executive Council of the Society and shall be announced immediately to all members by the Secretary.

**Article XI - Compatibility of Bylaws**
These Bylaws shall be compatible with the Articles of Incorporation, the Bylaws, and the Operating Rules of the Society; and any deviation there from is null and void.

**Article XII – Dissolution**
The Chapter may be dissolved according to procedures described in the Operating Rules of the Society. In the event that the Chapter dissolves, any funds not absorbed by the institution are to be disbursed to HFES.

## Appendix C Possible Activities for a Student Chapter

(Taken from actual student chapter events)

**Recruitment (Increasing Chapter Membership)**

- Opening social after the new student orientation
- Open enrollment signup sheet
- Visit HF/E and related classes to talk about HF/E
- Participation in campus recruitment events
- Bulletin board for HFES chapter announcements

**Student Membership to HFES**

- Encourage HFES student chapter members to go to the HFES Annual Meeting via email postings.
- Distribute brochures and flyers about the benefits of affiliation with the Society.
- Presentation on student benefits for joining HFES as well as student chapters.

**Guest Speakers: List of General Topics**

- Cross-cultural user experience design
- Human factors of spaceflight
- Industrial design
- Outreach opportunities
- Ideas about activities for HF/E involvement
- Human machine integration
- Usability researchers
- Career center
- Interaction design
- Student speakers (alumni)
- Human action integrated into design
- Traffic safety
- Professors in the HF/E department from other universities
- Experts in medical field relating to HF/E
- Members from HFES
- Human computer interaction
- Cultural ergonomics
- Pedagogy
- Seminar on preparing proposals
- Interviewing skills
- Dissertation tips and tricks
- Grant writing for grad students and faculty–tips
- Student speakers practicing for their defense
- Panels of students and faculty presenting grad life and the application process
- Invite a guest speaker who is an expert witness to talk about the profession
- Safer in the air: An analogy between aviation and medicine
- Technology with living disabilities
- Tour of patient simulation research lab
- Global and cultural awareness and the impacts on design

- Distance education
- Team communication
- Physiological measures
- Lecture that serves as a primer for a common HF/E tool or application, such as Visio or Morae or Photoshop.
- A panel where professionals would ask students why they would want to be in academia or industry. It is a method for professionals to investigate current thinking of the future generations of professionals.

**Students Service to HFES**

- Write articles regarding HFES activities/involvement
- Student contributions to HFES Bulletin
- Host HFES chapter meetings locally (your city)
- Submit thesis topics to discuss at the conference

**Outreach/Volunteerism**

- Form a HF public relations team.
- Students providing HF/E consulting to other campus organizations (web design, etc.) or companies for donations.
- Participate in on and off campus special day festivities to promote HF/E
- Gather contact information from students in other departments (computing, industrial design, architecture, language, culture and communication) to recruit.
- Listservs to disseminate information about upcoming events, available job positions, and reminder emails.
- HFES student chapter events added to university calendar (e.g. National Ergonomics Month)
- Go to middle schools and/or high schools to promote HF/E
- Presentations of HFES to different university departments
- Posters around campus of HFES student chapter events/activities
- Chapter donation of supplies to local efforts: school supplies to Iraqi children
- Chapter web site design project as a networking tool for current students and alumni
- Graduate school preparation and mentoring / information session for undergraduates
- Participate in university-wide open house events
- Habitat for Humanity
- Student Mondays: panels that address topics such as: The Internship Experience, How to Publish, How to get a Job in Academia, Industry, and Government and Experience from Leaders in the Field.
- Trash pick-up days: Local Beaches, Parks, etc.
- Volunteers for Arbor Day
- Campus usability audit
- Ergonomic assessment of a facility or classroom on campus
- Usability Day celebration and panel discussion
- Participation in and donations to school fundraisers

**Collaboration**

- Different departments within university (i.e., Industrial Design Department or Psychology Department)

- HF conference with other (nearby) university HF programs (students present research)
- Industries in the community related to HF/E
- Seminar on how to collaborate across disciplines
- Seminar on stress management with university counselor

**Socials**

- Welcoming events for new students
- Meet at restaurants
- Campus events to promote student involvement
- Holiday parties for HF/E students and department staff
- Take experts in HF/E out to dinner
- Alumni meetings
- Happy hours
- Weekly officer meetings
- Mentor partnerships (new HF/E students partner with experienced students)
- Online discussion boards
- Picnic in the park
- Wine tasting social
- Ball games
- Pizza and dessert sale
- HFES coffee shop hours in a research lab
- Alumni dinner
- Sporting events w/ members
- Smash pumpkin carving contest w/Engineering Department
- HFES library grand opening
- Morning coffee
- Game nights (e.g. Wii party)

**Field Trips**

- Ergonomics companies
- Psychology laboratories
- Human Factors research facilities
- Companies near campus involved with HF/E
- Middle schools and high schools to promote HF/E
- Visits to local chapters: Research presentations and lab tours
- Tour of an automobile manufacturer
- Tour of transportation research facilities e.g., intelligent transportation systems
- Tour of design firms
- Risk management retreat
- Tour of aircraft manufacturing company
- Tour of local airports

**Committees**

- Newsletter
- Website
- Wikis
- Student Reviewers

- Student chapter message board
- Forums

**Exploration/Creativity**

- Real world activities that focus on HF related topics
- Design a student chapter logo contest
- Open house
- Virtual haunted house
- Calendars given to new members with dues payment
- Book drives
- “Bad designs on campus” contest
- Online Courses Usability Evaluations
- HF Games, e.g., egg drop event, follow up discussion for relevant HF principles
- World of Illusions Booth
- Muffin Giveaway Booth
- T-Shirt Design Competition
- Student Awards

**Information Dissemination**

- HFES student chapter website
- Mailing List: Announcements of upcoming HFE events
- Banners and Flyers Posted around university campus
- Newsletter
- Yahoo Groups
- Facebook Group for local chapter
- Chapter Meetings
- Display Cabinet in Engineering Department

**Mentorship**

- Offer mentoring to new students
- Mentoring Future chapter officers by having “ride-along” training sessions with current officers
- Thesis Café: Students get the opportunity to talk to other students and alumni about their thesis/project interests
- Recent Graduates talks about experiences doing their thesis/project
- Panel of Chapter Members Attend New Student Orientation
- Email to new students regarding the effects of excessive stress on human performance and other “HF/E news you can use”
- Tutoring undergraduates at the university

**Continued Improvement**

- Soliciting donations from Alumni members of the chapter
- Development/maintenance of the HFES chapter library
- Send speakers to other student organizations to promote HFE in other fields
- Maintain connections with faculty and students in departments related to HFE

## Appendix D HFES Student Chapter Report

https://hfes.formstack.com/forms/student_chapter_report

# HFES Student Chapter Report

This report is to be submitted biannually to provide the HFES Executive Council, other Society leadership and interested HFES members information concerning the activities at your HFES Student Chapter. Report Deadlines:

- March 1 (or nearest first business day of March)
- September 1 (or nearest first business day of September)

Update Submission Date*

Required field

MMMM DD, YYYY

Student Chapter Name:*

Status*

- ◯ Chapter is Active
- ◯ Chapter is Inactive

Student Chapter Advisor:*

Student Chapter Advisor Email:*

Month When Elections are Held:

Student Chapter HFES Main Contact Name:*

Student Chapter Contact Email:*

Current Number of Chapter Members*

Please provide an overview of the past year's activities of the chapter that we can publish on our website*

## Student Chapter Officers

Chapter President*

First Name

Last Name

President Term Start*

MMMM DD, YYYY

President Term End*

MMMM DD, YYYY

Chapter Vice President

First Name

Last Name

Vice President Term Start

MMMM DD, YYYY

Vice President Term End

MMMM DD, YYYY

Chapter Secretary

First Name

Last Name

Secretary Term Start

MMMM DD, YYYY

Secretary Term End

MMMM DD, YYYY

Chapter Treasurer

First Name

Last Name

Treasurer Term Start

MMMM DD, YYYY

Treasurer Term End

MMMM DD, YYYY

Other Officers/Positions and Term Years

Please list the names of any additional officers or positions within your student chapter here.

Please let us know if there is anything HFES can do to provide you non-financial support or guidance:

If there has been a change in student leadership and you are no longer the main contact, please provide the contact information of the new student officer:

## Appendix E Officer Roles and Responsibilities

The Operating Rules for Student Chapters dictate that all chapters have individuals filling four roles: president, secretary, treasurer, and faculty advisor. Chapters may elect to create additional officer roles as well. Some that have been created are listed below.

**Mandatory Roles:**

**President**

- Serves as the chief executive officer of the Chapter
- Chair of the Executive Council
- Presides over meetings of the Chapter and the Executive Council
- Appoints, with the advice and consent of the Executive Council, all committee chairs not otherwise specified in the Chapter Bylaws
- Responsible for completing Appendix D (Chapter Activities report) at the start of the year (for planned activities) and at the end of the year (for actual activities)
- Responsible for notifying the HFES Central Office (info@hfes.org) and the Chair of the Student Affairs Committee (see Appendix A for contact info) of the new officers no later than July 1.

**Secretary**

- Maintains a true and faithful record of all business meetings of the Chapter and of the Executive Council.
- Serves as the custodian of all records and correspondence of the Chapter
- Maintains the membership list and other mailing lists pertinent to Chapter business
- Member of the Executive Council.

**Treasurer**

- Is responsible for the money and securities of the Chapter
- Maintains a true and faithful record of all financial transactions
- Prepares the annual financial status report, which shall correspond to the same fiscal year as the Society
- Deposits Chapter funds to the account of the Chapter in a bank or trust company selected by the Executive Council
- Requests reimbursement of funds from the HFES Central Office and any college/university office that provides funding for the chapter
- Disburses funds only upon approval by the Executive Council

**Faculty Adviser**

- Is responsible for the academic oversight of the Chapter
- Facilitates interactions between the Chapter and the university and communicating with the national organization as needed
- Is responsible to initiate an impeachment process for an incumbent officer who fails to fulfill his or her responsibility to the Chapter.
- Shall maintain membership in HFES as a Full Member
- Executive Committee
- Responsible for developing the schedule of activities for the year

- Develops the set of committees that will help execute the activities for the year
- Meets on a regular basis to ensure smooth functioning of the chapter

**Additional Roles that some Chapters have Developed**

**Vice President**

- Act as an understudy to the President
- Become acquainted with the business and operations of the Chapter.
- Assume the duties of the President during the President's temporary absence, or in the event that the President is not able to perform his or her duties, as determined by a two-thirds vote of the Executive Council
- Member of the Executive Council

**Communications Director**

**First-Year Liaison**

**Historian**

## Appendix F Student Chapter Handoff Template

**Officer Role:**

**Name:**

**Term Dates:**

1. **Summary of Major Activities**
   - Key events organized:
   - Major accomplishments:
   - Membership engagement initiatives:

2. **Ongoing or Pending Items**
   - Events in planning:
   - Unresolved tasks:
   - Deadlines early in the next term:

3. **Financial Overview (if applicable)**
   - Current budget status:
   - Outstanding reimbursements:
   - Active sponsorships or funding agreements:
   - Financial access details transferred (Y/N):

4. **Key Contacts**
   - Faculty Advisor:
   - HFES Staff Contact:
   - Sponsors/Partners:
   - Vendors or recurring speakers:

5. **Documents & Access Transferred**
   - Shared drive location confirmed (Y/N):
   - Social media access transferred (Y/N):
   - Email account access transferred (Y/N):
   - Event platform access transferred (Y/N):

6. **Recommendations for Success**
   - Lessons learned:
   - Suggested improvements:
   - Advice for incoming officer:

**Date Completed:**

**Transition Meeting Held (Date):**

## Appendix G HFES Reimbursement Procedure

Reimbursement requests for approved events must be submitted by:

- June 15 for events occurring between Jan 1 and May 31
- Dec 10 for events occurring between June 1 and Dec 10

**Note:** You do not need to wait until the end of the year to request reimbursement. Periodic reimbursement is suggested, rather than waiting until the deadline.

It is the treasurer's responsibility to ensure that the expenses that the chapter is requesting reimbursement for are allowable expenses.

i. The activities shall have benefited a majority of the members of the student chapter.
ii. No alcoholic beverages can be reimbursed.
iii. Travel and expenses relating to the annual society meeting (including social/networking events during the meeting) are not eligible.
iv. Paying speaker honorariums is not allowed (but small token gifts are supported).
v. If you have questions, please check with the HFES Central Office (info@hfes.org)

The reimbursement request has 3 components: 1) An email with a short description of event(s), shown immediately below 2) The Expense Reimbursement Form (Appendix H attached to the email), and 3) All receipts for expenses $25 USD or greater (email attachment).

1. **Event Description Email**: Document the event and provide a short description including the following (not necessarily in this order):
    a. Describe the events you're requesting reimbursement for
    b. Carefully detail what aspect(s) you are requesting reimbursement (itemized list by categories, e.g. food, speaker gift, van rental for field trip, etc.).
    c. As a validation for the funding provided to student chapters, we would like to have documentation as to the impact or success of the event.
    d. Note how many people attended (were involved)
    e. Was it an internal or external activity? (Did non-members attend/participate?)
    f. Explain the benefit: (to either your chapter, department, university, community… you can choose what criteria is most applicable for your event.)
    g. A second advantage to documenting the events as they occur is that it will be much easier to compile the year's information when applying for Outstanding Chapter honors.

2. **Expense Reimbursement Form:** Please complete all the fields in Appendix H. Note: Please think carefully about what address to use to send you the reimbursement (likely it should go to the Faculty Advisor). HFES will deduct $30 from any reimbursement if a stop payment has to be issued due to a lost check.

3. **Receipts**: Keep careful records of all expenditures for reimbursement. You will need to have receipts for reimbursement of all expenses of $25 USD or greater. (These can be scanned and submitted via email attachments along with your reimbursement request

form.)

a. The email with two attachments (Appendix H and receipts) should be emailed to info@hfes.org.

## Appendix H Expense Reimbursement Request Form

Download this form under “Student Chapter Resources” on this page: https://www.hfes.org/Groups-Communities/Student-and-Local-Chapters). **Send this form, along with required receipts, as a single pdf file to info@hfes.org.**

HUMAN FACTORS and ERGONOMICS SOCIETY

## HFES Student Chapter Reimbursement Request

**Date:** _____ **Name:** _____

**CHAPTER NAME *(Required)*:** _____

**Activity for which you are seeking reimbursement:**

_____

_____

_____

_____

**We appreciate receipts for *all* expenses, but they are only required for expenses $25 USD and greater. An acceptable receipt shows evidence that the person seeking reimbursement paid the expense with their own funds/credit card, (e.g., name and card ending in XXXX).**

**Detail**

Activity/Event: _____

Amount Requested: $ _____ Number of Participants: _____

Make Check Payable to: _____

Mailing Address: _____

Address Continued: _____

City: _____ State/Prov.: _____ Zip/Postal Code: _____

Payment by bank wire transfer is available to those outside of the United States only. Please email HFES to request a bank wire transfer at info@hfes.org.

REMIT EXPENSE REPORT AND RECEIPTS
AS ***A SINGLE PDF FILE*** TO INFO@HFES.ORG

## Appendix I Student Chapter Recognition

To recognize the contributions and achievements of the student chapters, applications will be judged on the number and quality of activities engaged in across several categories (listed below) with the emphasis on demonstrated excellence in a number of areas. Particular attention will be paid to the quality and outcome of each activity. To be considered for each of the levels of recognition, the student chapter must demonstrate activity in the required minimum number of categories listed for each level. However, activity within each category is not sufficient for the committee to consider the chapter as demonstrating excellence in the category. Excellence within each category will be determined by the quality and outcomes of activities presented, as judged by the awards committee. Quality could be related to number of events, number of participants in these events, creativity of events, efforts in organizing the events etc. The award committee consists of at least three reviewers who each finish their assessment independently and meet and discuss to reach a consensus. There is sometimes an additional reviewer recruited to decide on the borderline cases. It is the responsibility of the student chapters to document and present their achievements to the committee in the form of the application.

**Levels of Recognition**

- **GOLD** requires *activity* in at least eight categories with *excellence* in at least five categories, and at least 50% of the student members (or no fewer than 5 for chapters of < 10 members) also being HFES Student Affiliate members.

- **SILVER** requires *activity* in at least five categories with *excellence* in at least three categories, and at least 40% of the student members (or no fewer than 4 for chapters of < 10 members) also being HFES Student Affiliate members.

- **BRONZE** requires *activity* in at least three categories with *excellence* in at least two categories, and at least 25% of the student members (or no fewer than 3 for chapters of < 10 members) also being HFES Student Affiliate members.

**Eligibility Requirements**

Before a chapter's activities are evaluated, the committee confirms that the chapter meets the conditions below. A chapter that does not meet all of them is not eligible for recognition at any level, regardless of the strength of its activities.

- **Chapter reports submitted.** The chapter must have filed both required chapter reports covering the award year: the September 1 report of planned activities and the following February 1 report of actual activities (see Reporting Chapter Activities). A chapter with either report outstanding as of the application deadline is not eligible.
- **Student Affiliate percentage met.** The chapter must meet the HFES Student Affiliate percentage required for the recognition level sought. This percentage is based on student members only. Faculty and staff affiliates are reported separately on the application and are counted in neither the numerator nor the denominator.
- **Activities documented with dates and participant counts.** Every activity claimed must be reported with the date it took place and the number of people who took part. An activity missing either cannot be credited toward activity or excellence in any category.
- **Adviser endorsement included.** The application must include a letter of endorsement from the chapter's faculty adviser.

The list of activity categories follows; of primary importance is the quality and outcome of the activity in the category. (Example activities and further description for each category is provided at the end of the document.) The creativity category allows chapters to uniquely define activities and provides an opportunity for some chapters to obtain a recognition level for which they would not otherwise qualify (e.g., if they are starting or reviving a student chapter).

- Recruitment
- Guest speakers
- Field trips
- Outreach/volunteerism
- Collaboration
- Service to HFES
- Exploration
- Social
- Information dissemination
- Mentorship
- Continuous improvement
- Creativity

**How Activities Are Claimed**

Each activity is claimed under one primary category. The primary claim is the only one that counts toward the number of categories in which the chapter has demonstrated activity and excellence.

Where an activity genuinely contributed to other categories, the chapter may note up to two secondary categories. Secondary claims give the judges useful context, but they do not add to the chapter's category totals and cannot be used to reach the minimum number of categories for a recognition level.

Judges will not reassign an activity to a category the chapter did not claim. Read the category definitions carefully and choose as the primary category the one that matches the activity's main purpose.

Every activity must be reported with its date and the number of participants. Activities that are missing either are not counted.

Chapters must clearly indicate the recognition level sought (Gold, Silver, or Bronze), provide supporting materials that document the various activities of the chapter in each category, and provide a letter of endorsement from the chapter adviser. We encourage you to submit other materials that will support the application, such as brochures, announcements, or images from events, videos, and Web sites. Please include all supporting material electronically (scanned copies of the original documents is acceptable) as part of the application and provide a short narrative that sufficiently details your accomplishments in each category for evaluation.

This is a formal / professional application and should be treated as such. Appearance and usability of the application package do matter and will be taken into consideration. Additionally, while we do encourage chapters to learn from the previous year's submissions, each year's application material is considered to be part of the required effort to apply for the award

recognition. Simply reusing previous material could lead to a penalty or possible disqualification. If you have questions, please ask prior to submission.

**Submitting Your Application**

The deadline for receiving applications for the student chapter awards is ***June 30, 2027****.* No applications will be accepted after this date.

The first page of your application should include the following information: chapter president name and e-mail address, student chapter name, recognition level sought, faculty adviser name and e-mail address, mailing address, telephone number, and an outline of your application package. A template of the first page is provided on the next page of this document.

Also be sure to include the letter of endorsement from the chapter advisor as part of your compiled application.

Completed application materials should be compiled and saved as <u>one document</u>. (Preferably PDF, but Word is acceptable.). The completed application should be sent through the application portal (See Appendix J).

**Category Information and Example Activity List**

The list of activity categories and selected example activities is shown below. Note that the committee will consider additional activities for each category, with appropriate explanation from the student chapter. The creative category allows chapters to uniquely define activities and provides an opportunity for some chapters to obtain a recognition level for which they would not otherwise qualify (e.g., if they are a starting or reviving a student chapter). *To receive credit for a category, sufficient documentation must be provided for the evaluation*.Each definition below states what belongs in the category and what does not. Where an activity could plausibly fall into more than one category, use the definition that matches its main purpose to decide the primary claim.

- **Recruitment** – increase the number of members in the student chapter. Describe both your process and recruitment results (membership numbers must be given along with the number of new members who have joined, or percent change, where recruitment is emphasized).
    - **Counts:** organized efforts to bring new members into the chapter — orientation tables, classroom visits, open houses, information sessions, membership drives — reported with membership numbers at the start and end of the year and the number of new members or the percent change.
    - **Does not count:** routine communication with people who are already members; recruitment described without membership figures; growth reported with no account of what the chapter did to produce it.
- **Guest speakers** – invite outside professionals, professors from other universities, or professors from within the same university. This needs to be a direct result of the student chapter efforts.
    - **Counts:** a speaker invited through chapter effort — an outside professional, a faculty member from another university or another department, an alum, or a faculty member in your own program — presenting at a chapter event.

    - **Does not count:** a departmental colloquium or seminar series the chapter neither organized nor co-organized; a talk the chapter only publicized or attended; a course lecture.
- **Field trips –** visit nearby companies, industries, and so on, to learn about new domains, application areas, or opportunities.
    - **Counts:** a chapter-organized visit to a site members would not otherwise have access to — a company, research facility, design firm, hospital, transportation or manufacturing site, or another university's HF/E labs — undertaken to learn about a domain, application area, or career path.
    - **Does not count:** travel to the HFES Annual Meeting or another conference; an off-campus outing whose purpose is social rather than educational (claim it under Social); a tour arranged by a course or department that chapter members happened to attend.
- **Outreach/volunteerism** – participate in National Ergonomics Month; reach out to fellow students and students in K-12; increase public awareness and promotion of HF/E in general. (Outreach includes a "publicizing/awareness" element and goes beyond general service.)
    - **Counts:** National Ergonomics Month events; K-12 visits and demonstrations; campus-wide awareness events; ergonomic or usability assessments performed as a service to another group; community service performed as a chapter.
    - **Does not count:** activity whose audience is limited to chapter members; efforts aimed at recruiting members to your own chapter (claim under Recruitment); individual members volunteering on their own.
- **Collaboration** – work with other departments in your university or with other HF/E programs in nearby universities (e.g., local student conference).
    - **Counts:** an event or project planned and run jointly with another group — another department, another university's HF/E program, a local HFES chapter, or an industry partner — such as a regional student conference or a joint research showcase.
    - **Does not count:** inviting an outside speaker to your own event (claim under Guest speakers); attending an event another organization ran; informal contact that produced no shared activity.
- **Service to HFES** – participate on the Annual Meeting Host Committee or organizing activities as part of Student Career and Professional Development Day. (Individual student volunteer positions are <u>not</u> part of this category, nor is simple attendance.)
    - **Counts:** work performed for the Society — hosting or staffing an HFES event; serving on the Annual Meeting Host Committee; organizing activities for Student Career and Professional Development Day; contributing to an HFES committee or publication as a chapter; supporting another student chapter.
    - **Does not count:** attending an HFES conference; presenting a paper or poster at an HFES meeting; individual student volunteer positions at the Annual Meeting; simply holding HFES membership. These are valuable, but they belong to other categories or to individual recognition such as Student Member with Honors.
- **Exploration** – design or conduct research on projects taken on by the chapter; work together to solve some problem.
    - **Counts:** a design or research project the chapter takes on as a group — a design competition entry, a hack-a-thon or usabilithon, a chapter usability

evaluation, a “bad designs on campus” study, or a collective effort to solve a defined problem.
    - **Does not count:** individual members’ thesis or course research; a research talk given to the chapter with no chapter involvement in the work.
- **Social** – hold chapter social activities to foster interaction among the members.
    - **Counts:** activities held to build community among members — welcome events, holiday and end-of-semester parties, game nights, graduation celebrations, alumni socials.
    - **Does not count:** business or officer meetings; refreshments served at an event whose main purpose is something else (claim the event under that purpose and note Social as a secondary category).
- **Information dissemination** – use a Web site, mail group, wiki, etc., to share information, promote a program, and so on (This should be above and beyond that which would be expected for just running the chapter).
    - **Counts:** a chapter website kept current during the award year; a newsletter; an actively maintained social media presence; a wiki, shared drive, or resource library; a recurring digest of jobs, funding, or events.
    - **Does not count:** routine meeting announcements and reminder emails to members; a website or account that existed but was not updated during the year.
- **Mentorship** – mentor incoming and new students; participate in student orientation for incoming students (Formal activities / process for mentoring).
    - **Counts:** a structured process that pairs people over time — a formal mentoring program matching new students with experienced ones; officer transition and “ride-along” training; an organized graduate-school advising program; scheduled tutoring; serving as assigned mentors at new student orientation. A mentorship activity has a defined pairing or program, a stated purpose, and a duration.
    - **Does not count:** a one-time panel or information session (claim under Guest speakers or Information dissemination); informal help between friends; a social event at which newer and more senior students happened to mix.
- **Continuous improvement** – improve the resources of the chapter (library, facilities, etc.)
    - **Counts:** work that leaves the chapter stronger than it was — building or maintaining a chapter library or equipment; establishing recurring funding or sponsorship; creating documentation, templates, or officer handoff materials; revising bylaws or officer structures.
    - **Does not count:** running the same program of events as the previous year; purchases that are not available to the membership as a whole.
- **Creativity** – utilize creative approaches to chapter activities.
    - **Counts:** an activity that is genuinely novel for the chapter, a creative approach to a familiar activity, or worthwhile work that does not fit any other category. Chapters define this category for themselves; the application should explain what made the activity creative and what it accomplished.
    - **Does not count:** an ordinary activity placed here because it did not fit elsewhere, with no explanation of what was creative about it.

- **Note:** each activity is claimed under one primary category, with up to two secondary categories permitted for context. Only the primary claim counts toward the chapter's category totals. See How Activities Are Claimed, earlier in this appendix.

## Appendix J Application for Student Chapter Recognition

https://hfes.formstack.com/forms/2026_sca




### 2026 Outstanding Student Chapter Awards Application

Chapters are recognized for their contributions and achievements (both the number and quality of activities) across a number of categories as listed below, with emphasis on demonstrated excellence in a specified number of areas. The levels of recognition are as follows:

- **GOLD** requires activity in at least eight categories with excellence in at least five categories, and at least 50% of the student members being HFES Student Affiliate members.
- **SILVER** requires activity in at least five categories with excellence in at least three categories, and at least 40% of the student members being HFES Student Affiliate members.
- **BRONZE** requires activity in at least three categories with excellence in at least two categories, and at least 25% of the student members being HFES Student Affiliate members.

Chapters must clearly indicate the recognition level sought (Gold, Silver, or Bronze), provide supporting materials that document the various activities of the chapter in each category, and provide a letter of recommendation from the chapter adviser. We encourage chapters to submit other materials that will support the application, such as brochures, announcements, or images from events, videos, and Web sites. Please include all supporting material electronically as part of the application, and provide a short narrative that sufficiently details your accomplishments in each activity category.

Please refer to the Student Chapter Handbook for details. Submission Deadline: June 30, 2026.

Student Chapter Name:*

Required field

Student Chapter Advisor:*

Student Chapter HFES Main Contact Name:*

Student Chapter Contact Email:*

Select Recognition Level Sought*

Application Submission Package*

Choose File | Remove File | No File Chosen

Other Supporting Documents

Choose File | Remove File | No File Chosen

Other Supporting Documents

Choose File | Remove File | No File Chosen

Other Supporting Documents

Choose File | Remove File | No File Chosen

Save and Resume Later

Submit Form

## Appendix K Student Member with Honors

**This designation honors students who have made an outstanding contribution to the discipline and HFES during their tenure as a student. To qualify, students must meet *all* of the following eligibility requirements:**

- Student membership in HFES for at least six months prior to application for honors designation (as evidenced by your HFES ID#).
- Graduate student, or class standing of junior or senior for an undergraduate.
- Minimum GPA of 3.75 (out of 4.0) or its equivalent for graduate students as evidenced by a transcript (international students with alternate grading scales or courses should provide documentation/justification of equivalence to a GPA of 3.75).
- Minimum GPA of 3.50 (out of 4.0) or its equivalent for undergraduate students, as evidenced by a transcript (international students with alternate grading scales or courses should provide documentation/justification of equivalence to a GPA of 3.75).
- Successful completion of at least three human factors and ergonomics- related courses with a grade of A or its equivalent (as evidenced by a transcript or letter from the instructor).
- Significant HF/E related service to HFES at the society-wide or local chapter level, or to the local community (provide a letter from the chapter adviser, committee chair, or officer of the group).
- One letter of recommendation from a faculty member, which specifies and demonstrates the outstanding contributions made by the student. This letter of endorsement from the faculty member is critical to the application. The letter should highlight the outstanding contributions of the student and indicate how those achievements meet the requirements for the student to be recognized as a *Student Member with Honors* in the society by distinguishing the student from their peers.

In addition, at least <u>two</u> of the following three conditions must be met:

1. Publication of a journal article. The article must appear in an HFES-approved refereed journal (e.g., *Human Factors, Ergonomics, Applied Ergonomics*, *Journal of Cognitive Engineering and Decision Making*, or peer-reviewed journals approved by the Awards Committee listed below:

    - Accident Analysis & Prevention
    - Applied Ergonomics
    - Ergonomics
    - Human Factors
    - Human Factors in Healthcare
    - Human Factors and Ergonomics in Manufacturing & Service Industries
    - International Journal of Human-Computer Interaction
    - International Journal of Industrial Ergonomics
    - International Journal of Occupational Safety and Ergonomics
    - Journal of Safety Research
    - Occupational Ergonomics
    - Safety Science
    - Theoretical Issues in Ergonomics Science
    - WORK: A Journal of Prevention, Assessment & Rehabilitation

    - All IEA (https://iea.cc/journals/) endorsed, peer-reviewed journals are approved for this criterion (Note: the approval is for journal articles appearing in these outlets. Book reviews, proceedings papers, or conference abstracts published in the journals do not count toward this requirement). Approval for an article published in a journal not included on this list should be obtained in writing from the Student Affairs Chair by the candidate prior to submitting the application). The student must be listed as the first author. Articles "submitted" or "under review" are not sufficient for meeting this criterion.
2. A human factors and ergonomics -related lecture presentation at a national or international meeting (provide the reference and photocopy from program or letter from adviser).
3. Evidence of significant contribution to an industry project (e.g., design award, patent, transformational product or system design, ergonomics program development). Note: The student must be a primary contributor to the project, and activities must significantly exceed those required of most "capstone" courses. A letter from the project sponsor detailing the student's role and the significance of the project is required for this criterion

It should be noted that meeting at least two of the three conditions above is necessary but not sufficient for the award. The quality of the candidate's contributions in each of the areas will also be evaluated.

**Submitting Your Application**

The deadline for applications for the Student Member with Honors is *June 30.* No application will be accepted after this date.

Completed applications (minus the letter of recommendation) should be submitted at 2026 Student Member with Honors Application - Intellistack

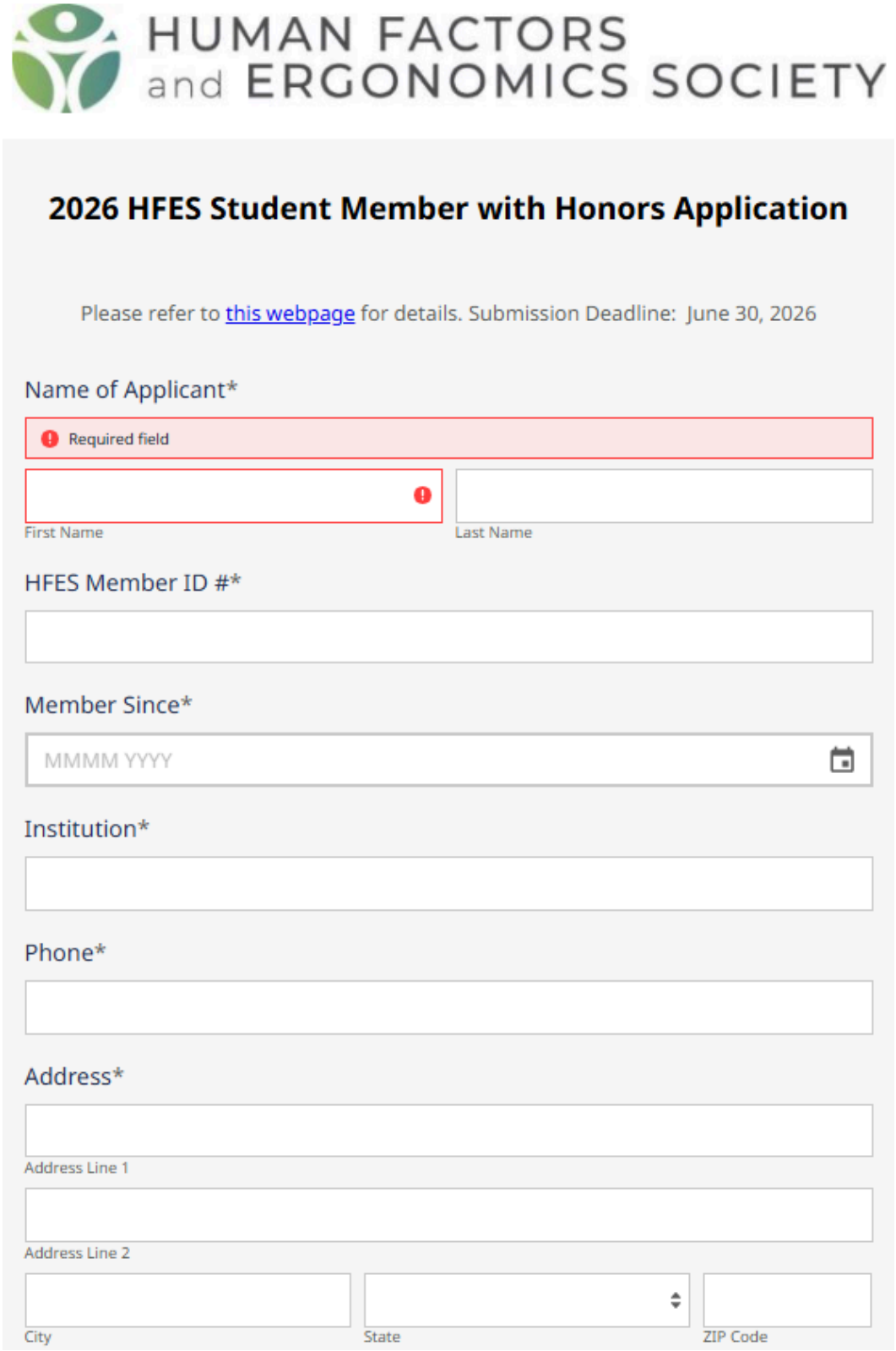
The letter of recommendation should be e-mailed to the Student Affairs Committee Chair (see Appendix A for contact info).

**Application Checklist**

- Application cover page with information listed above (see template on next page of this document)
- Transcript (unofficial is acceptable)
- HFES member ID# and date joined
- Description of service to HFES, chapter or community
- Letter in support of service
- Reference of publication (if applicable)
- Presentation title, conference name, location, and date (if applicable)
- Copy of relevant page of conference program or letter from conference or adviser
- Description and images to support significant industry contribution (if applicable)
- Letter of recommendation – electronic copy sent directly from faculty member to the Student Affairs Committee Chair (see Appendix A for contact info).

## Appendix L Application for Student Members with Honors

https://hfes.formstack.com/forms/2026_smwh



HUMAN FACTORS and ERGONOMICS SOCIETY

**2026 HFES Student Member with Honors Application**

Please refer to this webpage for details. Submission Deadline: June 30, 2026

Name of Applicant*

Required field

First Name

Last Name

HFES Member ID #*

Member Since*

MMMM YYYY

Institution*

Phone*

Address*

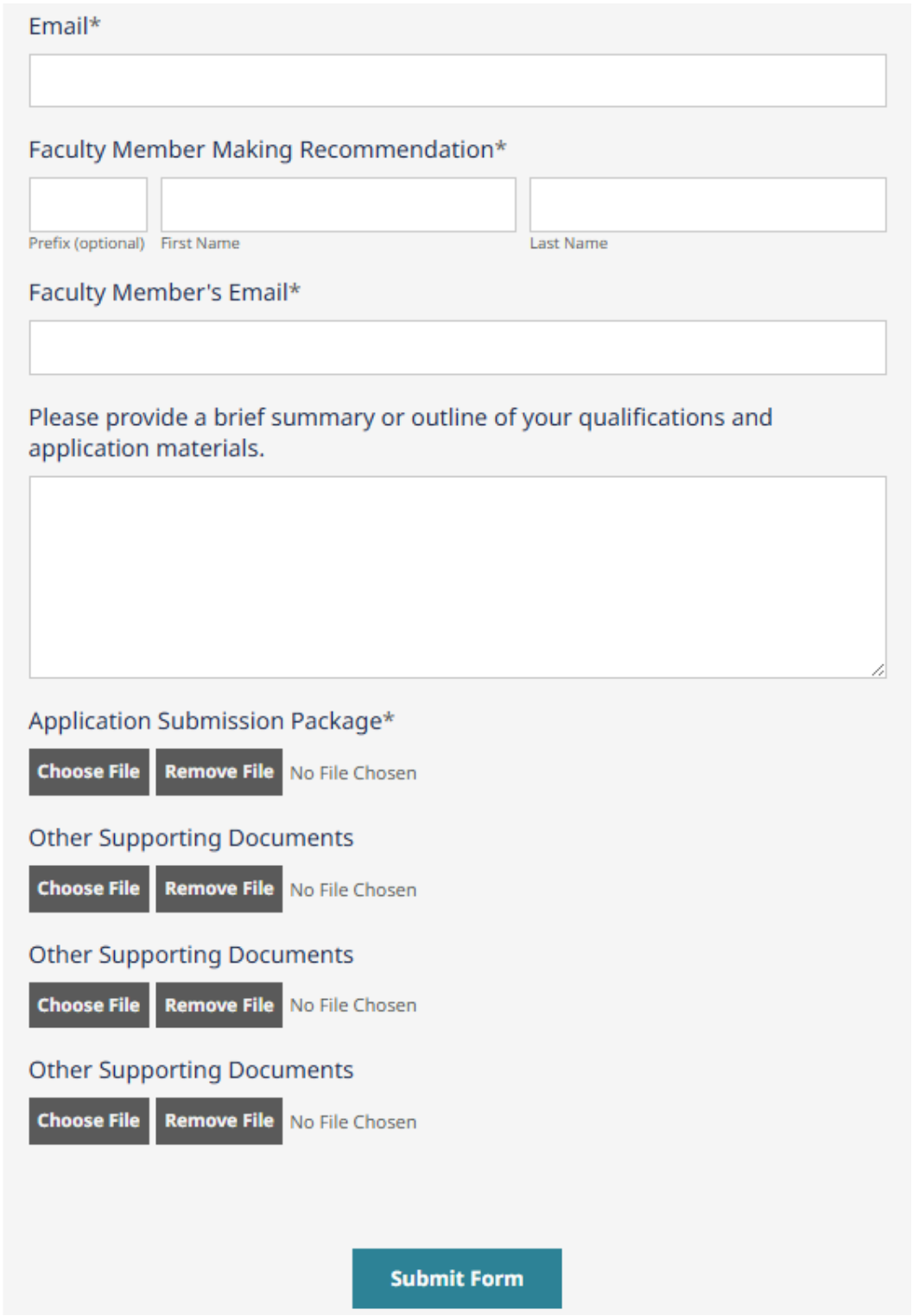
Address Line 1

Address Line 2

City

State

ZIP Code


Email*
Faculty Member Making Recommendation*
Prefix (optional)
First Name
Last Name
Faculty Member's Email*
Please provide a brief summary or outline of your qualifications and application materials.
Application Submission Package*
Choose File
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No File Chosen
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## Appendix M HFES Policies and Guidelines for Student Chapter Websites

Policies

The following items must appear on all local and student chapter websites:

1. HFES logo, which you can obtain (.jpeg or .png formats) from HFES




**Note:** Please review the Society Logo Use Guidelines.

2. The group's name must include "HFES" or "Human Factors and Ergonomics Society," such as "Arizona Chapter of The Human Factors and Ergonomics Society", or "HFES Old Dominion University Student Chapter".

3. A link to the HFES website (http://www.hfes.org) must appear on your chapter home page.

Guidelines

1. Send the URL for your chapter website to HFES at info@hfes.org so that we may link to it. The HFES website contains links to all active TG and chapter websites.
2. Be sure to notify HFES whenever your website URL changes so that we may update our site.
3. Test all links throughout your site regularly to ensure they are still active; update as needed.