



# Chapter/Squadron Handbook

***This EAA Chapter/Squadron Handbook is dedicated to the thousands of EAA Members who have volunteered their time and energy to help with the growth of EAA as they serve as a Chapter or Squadron Leader.***

**“KEEP THE SPIRIT!”**

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## **INTRODUCTION TO THE CHAPTER/SQUADRON HANDBOOK**

Welcome to the new Chapter/Squadron Handbook! We would like to take the opportunity to thank you for your involvement with your local Chapter or Squadron. Throughout this handbook, even though we may use the term Chapter, we are referring to all Chapters, EAA, IAC, Vintage, Ultralight and Warbird Squadrons.

This section contains the following information:

### **Section 1 – Introduction to the Chapter Handbook**

Section 1.1 Introduction

Section 1.2 EAA Headquarters Contacts

## **INTRODUCTION TO CHAPTER/SQUADRON HANDBOOK**

Welcome! If you are reading this page, you are probably either a current Chapter Leader, a current Chapter Member, or you are an EAA Member thinking about starting or reactivating an EAA Chapter. Regardless, this Handbook is designed to help you as you and the other Leaders of your Chapter enjoy the friendship, flying, and fun that being an EAA Chapter offers.

First off, please let us clarify one thing. Just like any masterpiece, and we hope that at least some of you consider this Handbook a masterpiece, it will never be finished. Historians have said when many great artists have presented their artwork to the public for the first time they often say their work is perfect or isn't quite finished. This is the case with this document. Since the very first EAA Chapter was formed, EAA Staff and EAA Volunteers have tried to compile a Handbook to help existing Chapters function successfully as well as assist those EAA Members that want to form a new EAA Chapter. This particular version of the Chapter Handbook is probably the seventh or eighth edition and no doubt there will be many more updates in the future. What we are trying to say is that this Handbook will never be finished and you, along with all of the other Chapter Leaders and EAA Members, will all play a role in updating and continuing to refine this document.

We have divided the Chapter Handbook into several sections. As new topics are added we will provide your chapter with additional pages for your copy of this document. At the same time, if we make changes or revisions, we will send these to you to replace pages in your Chapter Handbook.

Before you start reading the sections of the Chapter Handbook please remember one thing. This is your Chapter Handbook and it is very important that you as a Chapter Leader and your Chapter as a Member of the Chapter Family take ownership of this document. If you see things that could be explained better or in greater detail, or if you see things that need to be added, then it is up to you to take the first step and to help make improvements and refinements in this Handbook. EAA Members have always been great Leaders and Inventors, so there is no reason why you, the rest of the Members of your Chapter, and the Chapter Office, can't make this Handbook the best tool within the Chapter Family,....that's the "can-do EAA spirit"!

## EAA Headquarters Contacts

### Promoting – Access to the Dream of Flight

EAA Aircraft Insurance Plan	866/647-4EAA	<a href="http://www.eaa.org/memberbenefits/">www.eaa.org/memberbenefits/</a>	<a href="mailto:membership@eaa.org">membership@eaa.org</a>
EAA AirVenture Oshkosh	888/EAA-INFO	<a href="http://www.airventure.org">www.airventure.org</a>	<a href="mailto:airventure@eaa.org">airventure@eaa.org</a>
Ultralight Program	888/EAA-INFO	<a href="http://www.eaa.org/ultralights">www.eaa.org/ultralights</a>	<a href="mailto:ultralights@eaa.org">ultralights@eaa.org</a>
Sport Pilot/Light-Sport Aircraft Hotline	877/FLY-1232	<a href="http://www.sportpilot.org">www.sportpilot.org</a>	<a href="mailto:sportpilot@eaa.org">sportpilot@eaa.org</a>
NAFI (National Assn. of Flight Inst.)	920/426-6801	<a href="http://www.nafinet.org">www.nafinet.org</a>	<a href="mailto:nafi@eaa.org">nafi@eaa.org</a>
International Aerobatic Club (IAC)	920/426-6574	<a href="http://www.iac.org">www.iac.org</a>	<a href="mailto:iac@eaa.org">iac@eaa.org</a>
Vintage Aircraft Association (VAA)	920/426-4825	<a href="http://www.vintageaircraft.org">www.vintageaircraft.org</a>	<a href="mailto:vintage@eaa.org">vintage@eaa.org</a>
EAA SportAir Workshops	800/967-5746	<a href="http://www.sportair.com">www.sportair.com</a>	<a href="mailto:info@eaa.org">info@eaa.org</a>
Safety Programs			
Flight Advisor & Technical	888/EAA-INFO		
Counselor Programs	920/426-6864	<a href="http://www.eaa.org/members/">www.eaa.org/members/</a>	<a href="mailto:safetyprograms@eaa.org">safetyprograms@eaa.org</a>
Warbirds of America	920/426-4874	<a href="http://www.warbirds-eaa.org">www.warbirds-eaa.org</a>	<a href="mailto:warbirds@eaa.org">warbirds@eaa.org</a>
EAA Chapter Information	888/EAA-INFO	<a href="http://www.eaa.org/chapters/">www.eaa.org/chapters/</a>	<a href="mailto:chapters@eaa.org">chapters@eaa.org</a>
EAA/Ford Motor Company Vehicle Discount	800/843-3612	<a href="http://www.eaa.org/memberbenefits/">www.eaa.org/memberbenefits/</a>	<a href="mailto:benefits@eaa.org">benefits@eaa.org</a>
EAA/Hertz Rental Car Program	800/654-2200	<a href="http://www.eaa.org/memberbenefits/">www.eaa.org/memberbenefits/</a>	<a href="mailto:benefits@eaa.org">benefits@eaa.org</a>
EAA Publications	800/236-4800	<a href="http://www.eaa.org/sportaviation/">www.eaa.org/sportaviation/</a>	<a href="mailto:editorial@eaa.org">editorial@eaa.org</a>
		<a href="http://www.eaa.org/sportpilot/">www.eaa.org/sportpilot/</a>	

### Preparing for the Future of Aviation

Young Eagles Program	877/806-8902	<a href="http://www.youngeagles.org">www.youngeagles.org</a>	<a href="mailto:yeagles@eaa.org">yeagles@eaa.org</a>
EAA Education	920/426-6570	<a href="http://www.eaa.org/education.html">www.eaa.org/education.html</a>	<a href="mailto:education@eaa.org">education@eaa.org</a>
Scholarships	920/426-6884	<a href="http://www.eaa.org/education/scholarships/">www.eaa.org/education/scholarships/</a>	<a href="mailto:scholarships@eaa.org">scholarships@eaa.org</a>
EAA Air Academy	920/426-6820	<a href="http://www.eaa.org/education.html">www.eaa.org/education.html</a>	<a href="mailto:airacademy@eaa.org">airacademy@eaa.org</a>
Aviation Services	888/EAA-INFO	<a href="http://www.eaa.org/members/">www.eaa.org/members/</a>	<a href="mailto:info@eaa.org">info@eaa.org</a>
Fund Development	800/236-1025	<a href="http://www.eaa.org/support/">www.eaa.org/support/</a>	<a href="mailto:development@eaa.org">development@eaa.org</a>

### Preserving the Heritage of Aviation

EAA AirVenture Museum	920/426-4818	<a href="http://www.airventuremuseum.org">www.airventuremuseum.org</a>	<a href="mailto:museum@eaa.org">museum@eaa.org</a>
Artifact Donations	920/426-4877	<a href="http://www.airventuremuseum.org/collection/">www.airventuremuseum.org/collection/</a>	<a href="mailto:museum@eaa.org">museum@eaa.org</a>
B-17 Tour	800/FLY-NB17	<a href="http://www.b17.org">www.b17.org</a>	<a href="mailto:b17@eaa.org">b17@eaa.org</a>
Library Services	920/426-4848	<a href="http://www.airventuremuseum.org/collection/">www.airventuremuseum.org/collection/</a>	<a href="mailto:library@eaa.org">library@eaa.org</a>

### Protecting the Right to Fly

Aeromedical/Legal Advisory	888/EAA-INFO	<a href="http://www.eaa.org/members/">www.eaa.org/members/</a>	<a href="mailto:info@eaa.org">info@eaa.org</a>
Autogas STC	920/426-4843	<a href="http://www.aviationfuel.org">www.aviationfuel.org</a>	<a href="mailto:stc@eaa.org">stc@eaa.org</a>
Government & Industry Relations	888/EAA-INFO	<a href="http://www.eaa.org/members/">www.eaa.org/members/</a>	<a href="mailto:govt@eaa.org">govt@eaa.org</a>

### EAA Membership Services

800/JOIN-EAA (564-6322) (8 a.m. – 7 p.m. Monday, 8 a.m. – 6 p.m. Tuesday – Friday)

For new or renewing memberships to EAA or EAA Divisions, AirVenture Oshkosh, address changes, gift certificates, or merchandise sales. International callers: 920/426-4800

### EAA Members Information Line

888/EAA-INFO (322-4636) (Office hours are 8:15 a.m. – 5:00 p.m. Monday-Friday, CST)

Use this toll-free number for: information about AirVenture Oshkosh, technical aviation questions, Chapters, and Young Eagles. Please have your membership number ready when calling.

For 24/7 information, news, and updates log on to: [www.eaa.org](http://www.eaa.org)

## Section 2

### **CHAPTER ORGANIZATIONAL STRUCTURE**

In this section of the Chapter Handbook you will find information needed to organize and maintain a Chapter structure. The Chapter Bylaws are the documents that establish Chapter structure, and should govern how the business functions of the Chapter transpire. Please use the following Chapter Bylaws as a model to adopt your Chapter's Bylaws or amend your existing Chapter Bylaws. **Before your Chapter adopts Chapter Bylaws, your Chapter is required to send a copy of the bylaws to the EAA Chapter Office at EAA Headquarters for review.**

Also in this section is some information on obtaining and maintaining a non-profit incorporation with your local government authorities, which is mandatory for maintaining a "current" Chapter status.

This Section contains the following information:

#### **Section 2 – Table of Contents**

Section 2.1	Chapter Bylaws
	<ul style="list-style-type: none"><li>• Chapter Name and Location (Articles I &amp; II)</li><li>• Purposes of a Chapter (Article III)</li><li>• Chapter Membership Guidelines (Article IV &amp; V)</li><li>• Chapter Membership Meetings (Article VI)</li><li>• Chapter Leadership Structure (Articles VII &amp; VIII)</li><li>• Chapter Elections (Article IX &amp; X)</li><li>• Transition of Leadership (Article XI)</li><li>• Financial Reports (Article XII)</li><li>• Facilities, Tools and Other Assets (Article XIII)</li><li>• Chapter Nominating Committee (Article XIV)</li><li>• Chapter Membership Committee (Article XV)</li><li>• Organization Committees (Article XVI)</li><li>• Dispute Resolution (Article XVII)</li><li>• Amendments (Article XVIII)</li><li>• Dissolution (Article XIX)</li><li>• Chapter Charter Authorization (Article XX)</li></ul>
Section 2.2	Chapter Committee Guidelines
Section 2.3	Non-Profit Incorporation Guidelines

## Chapter Bylaws

### Introduction:

The Chapter Bylaws is a document that establishes Chapter structure, and governs how business functions of the Chapter transpire. These guidelines are provided to assist new and existing Chapters in the formulation of their Chapter Bylaws. Please remember to send a copy of your Bylaws to the Chapter Office.

### Instructions:

*These EAA Chapter Bylaws Guidelines may be adopted partially or in their entirety. To adopt these bylaws as they are written, all your Chapter needs to do is to fill-in the blanks on page 2, make some decisions about the portions that are marked as optional, and prepare a final version. In addition, your Chapter will need to adopt your new Chapter Bylaws by passing a resolution at during a regular Chapter Membership Meeting. Also, please note there is an area on the last page where the Officers of your Chapter should sign and date the Bylaws.*

*Remember that according to Article XVIII when Chapter Bylaws are adopted or amended, you should send copies to the Chapter Office at EAA Headquarters.*

***Please Note: The sections of these Bylaw Guidelines that are “bold type” indicate portions that are a requirement in accordance with the Bylaws of EAA and the appropriate EAA Division.***



Title: \_\_\_\_\_

*(Example: "Fun Flyers", Experimental Aircraft Association (EAA) Chapter 2003, Incorporated)*

### Bylaws

Date

*(Example: January 1, 2002)*

Article I. Name: \_\_\_\_\_

*(Example: The name of this Chapter is "Fun Flyers", EAA Chapter 2003, Incorporated.)*

Article II. Location: \_\_\_\_\_

*(Example: The office for the transaction of business for the Chapter shall be located in (Name of City), (Name of State or Province), (Name of Country).)*

Article III. Purpose: The purpose of this Chapter is to:

*(The following examples are taken from several sets of Chapter Bylaws and they are intended as examples only and for informational purposes only. Each Chapter should adopt it's own "Purpose".)*

1. Promote, encourage, and facilitate an atmosphere where all are welcome to join-in and become a part of recreational aviation.
2. Promote, encourage, and foster an environment that celebrates and nurtures the participation of families and the spirit of volunteerism within the world of recreational aviation.
3. Promote, encourage, and facilitate an environment that fosters safety and high standards in the design, construction, restoration, and operation of all types of recreational aircraft.
4. Promote, encourage, and facilitate recreational aviation activities that provide educational opportunities.
5. Promote a positive, productive, and cooperative relationship between the Chapter and those governmental agencies and private enterprises that provide aviation services and facilities to the benefit of members of the Chapter.
6. Promote, encourage, and facilitate Membership in the EAA (Experimental Aircraft Association Incorporated).
7. Support and promote the mission, vision, goals and objectives of the EAA (Experimental Aircraft Association) through programs and services within the Chapter family.
8. Have fun!

**Article IV. Chapter Membership**

**Eligibility for Chapter Membership:** Eligibility for membership in the Chapter is open to any person who has an interest in recreational aviation, subject to the classifications of membership listed in Article IV, Sections 1-5.

**Classifications of Chapter Membership:** There are five (5) types of Chapter Memberships. These Chapter Membership Classifications include; Regular, Family, Honorary/Complimentary, Special, and Life. The specific details of these Chapter Membership Classifications are described in the following paragraphs:

1. **Regular Chapter Membership:** A Regular Chapter Member shall be any person who pays Chapter dues and is a Member in good standing of EAA (Experimental Aircraft Association, Incorporated).
2. **Family Chapter Membership:** A Family Chapter Membership shall be any family, including parents, and children, who pay the appropriate Chapter Membership dues and are Family Members of EAA (Experimental Aircraft Association Incorporated).
3. **Honorary/Complimentary Membership:** A Honorary/Complimentary Chapter Member shall be any person to whom the Chapter Officers, Chapter Board of Directors, or Chapter Membership wishes to extend an Honorary Chapter Membership. Honorary/Complimentary Chapter Memberships may be given to a person in recognition or appreciation of the support that person has provided to the Chapter. Honorary/Complimentary Chapter Members may not hold any elected or appointed Chapter Office or Position, nor are they entitled to any voting privileges within the Chapter. Honorary/Complimentary Members are not required to be members of EAA (Experimental Aircraft Association Inc.), but the Chapter Office at EAA Headquarters will extend a complimentary one year EAA Membership to any Honorary/Complimentary Chapter Member upon written request from the Chapter Officers, Chapter Board of Directors or Chapter Membership.
4. **Special Chapter Membership:** A Special Chapter Member shall be any person, who for temporary or short-term economic reasons is unable to pay the appropriate Chapter Membership dues and to whom the Chapter Officers, Chapter Board of Directors, or Chapter Membership wishes to extend a Chapter Membership. The Chapter Office at EAA Headquarters will extend a one year complimentary EAA Membership to any Special Chapter Member upon written request from the Chapter Officers, Chapter Board of Directors, or Chapter Membership.
5. **Life Chapter Membership:** A Life Chapter Membership may be bestowed on an individual Chapter Member at the discretion of the Chapter Officers, Chapter Board of Directors, or Chapter Membership. All Life Chapter Members must be members in good standing of EAA (Experimental Aircraft Association, Incorporated). A Chapter Life Membership recognizes the long-term commitment to EAA and the Chapter made by the individual. A Life Chapter Member may hold any Chapter Office, shall have full voting privileges within the Chapter, and is exempt from annual Chapter dues.

**Duration of Chapter Membership:** The Duration of a Regular and Family Chapter Membership shall be one (1) calendar year. Honorary/Complimentary or Special Chapter Memberships may be extended or continued beyond one (1) year at the discretion of the Chapter Officers, Chapter Board of Directors, or Chapter Membership. Life Chapter Membership is continuous for the life of the Chapter Member. Life Chapter Membership is not transferable to another person. All Chapter Members with voting privileges in the Chapter must maintain a current membership with the EAA (Experimental Aircraft Association Incorporated), except for the Honorary/Complimentary Chapter Members.

**Voting Privileges of Chapter Membership:** Voting privileges within the Chapter shall be limited to Regular Chapter Members, Family Chapter Members (excluding Children under 18 years of age), Special Chapter Members and Life Chapter Members. Honorary/Complimentary Chapter Members shall not have voting privileges within the Chapter.

**Removal of Chapter Membership:** Chapter Membership is a privilege, which requires an appropriate commitment from each Chapter Member. Each Chapter Member shall accept the responsibilities of Chapter Membership, and by acceptance agrees to promote EAA and the Chapter. In the event a Chapter Member fails to meet these requirements, they may be asked to relinquish their Chapter Membership in accordance with the following conditions:

1. Any Chapter Member, who by intentional negligent or reckless deed or action, harms or jeopardizes the reputation or assets of the Chapter or EAA, may be called before the Chapter Board of Directors and Chapter Officers for review. Upon conclusion of a review, the Chapter Board of Directors and Chapter Officers may upon finding reasonable cause, recommend to the Chapter Membership that said member be removed from Chapter Membership. Said Member may then be removed, by a majority vote of eligible members at any regular or special Chapter Membership Meeting where a quorum exists.
2. Any Chapter Member who fails to remit their Chapter Membership dues or fails to maintain their Chapter Membership in the EAA shall be considered removed from Chapter Membership.

**Resignation of Membership:** Any Chapter Member may resign their Chapter Membership at any time by delivering to any Chapter Officer a written notice of resignation. The resignation of Chapter Membership shall become effective on the date stated in the written notice. In the event the written notice of resignation does not contain an effective date, the date the Chapter Member delivers the written notice to any Chapter Officer shall become the date of resignation.

<b>NOTE:</b>	It is the policy of EAA and all EAA Chapters to openly welcome guests and visitors to EAA Chapter functions and activities. Guests and visitors do not enjoy the privileges of Chapter Membership, nor do they pay any dues or assessments to the Chapter, and they are not entitled to privileges of Chapter or EAA Membership until they become a regular member of both the Chapter and EAA.
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Article V. Chapter Membership Dues and Assessments

The Chapter Officers and Chapter Board of Directors, with the concurrence of the Chapter Membership, will determine appropriate dues and assessments. The rate of dues or the amount of assessment shall be voted on and agreed to by the Chapter Membership at any regular Chapter Membership Meeting or Special Chapter Membership Meeting. The proposed dues or assessment must pass by a majority vote of eligible Chapter Members in attendance. Dues and assessments shall be paid to the Chapter Treasurer, or any person they may designate. Dues are to be paid annually and are payable upon joining and every January 1<sup>st</sup> of each year thereafter. Assessments shall be paid as determined by the Chapter Officers and Chapter Board of Directors, with the majority concurrence of the Chapter Membership. Dues and assessments shall be considered wholly earned and shall not be pro-rated in the event of expulsion or resignation. Honorary/Complimentary Chapter Members and Special Members shall not be required to pay any dues or assessments. Life Chapter Members, while not required to pay dues, however may be required to pay assessments.

Article VI. Meeting of Members

1. All meetings of the Chapter Members shall be held at a place to be determined by the Chapter Board of Directors.

*NOTE: As an option, Chapters may chose to allow the President to determine when and where meetings of Chapter Members will take place. If the Chapter chooses to do this they may do so by removing "Chapter Board of Directors" from item 1. above and inserting "Chapter President".*

2. Notice of any Regular Chapter Meeting of the Chapter Members shall be given before such meeting by notice published in a Chapter publication, such as the Chapter Newsletter, or by phone, fax, or e-mail.
3. Special Chapter Membership Meetings may be held at such time and place as the Chapter President may determine. Special meetings may also be called by a two-thirds (2/3) majority of the Chapter Board of Directors.
4. Notice of Special Chapter Membership Meetings, stating the location, time, and purpose of the meeting shall be given in the same manner as the notice required for the regular meetings, or by special letter.
5. A quorum is required for any Chapter Membership Meeting; a quorum shall consist of at least one third (1/3) of the Chapter Members in person or by proxy but not less than 10 Chapter Members.
6. In the absence of the Chapter President, Chapter Vice President, Chapter Secretary, and Chapter Treasurer, a temporary Meeting Chairman may be appointed by the Chapter Board of Directors and shall act as the presiding officer.
7. At every meeting of the Chapter Members, each voting Chapter Member may have one vote on any question or resolution. In the absence of a Chapter Member, that Chapter Member shall have the right to vote by proxy. The Chapter Board of Directors shall be responsible for the method by which any proxy votes are issued, accepted, or counted.

8. A simple majority of Chapter Members, that are eligible to vote, must be present or represented by proxy for the adoption of any resolution, except for a resolution that calls for the Chapter to separate its relationship with the Experimental Aircraft Association, Incorporated. In which case a majority of not less than eighty percent (80%) of the members eligible to vote, present, or represented by proxy, is necessary for the adoption such resolution.

Article VII     Chapter Officers

1. The Chapter Officers shall be Chapter President, Chapter Vice President, Chapter Secretary, and Chapter Treasurer, or a combination of Chapter Secretary and Chapter Treasurer.
2. The term of office for all Chapter Officers shall be two (2) year.

*Note: As an option, Chapters may choose to use a one (1) year term for all Chapter Officers.*

3. The Chapter Officers shall be elected at the regularly scheduled November Chapter Membership Meeting and shall hold office for one (1) year, from date of installation. Installation of Chapter Officers shall be at the December Chapter Membership Meeting following their election, but no later than January 1<sup>st</sup> following their election.
4. The Chapter Treasurer may be bonded in an amount to be determined by the Chapter Officers. The premium to bond the Chapter Treasurer shall be at the expense of the Chapter.

Article VIII.    Duties of the Chapter Officers

The following duties shall be performed by the Chapter Officers: The Chapter Officers may, from time to time, be called upon to perform additional duties, they may also, at their discretion, and in conjunction with direction from the Chapter Board of Directors, perform additional duties for the betterment, improvement, and well being of the Chapter.

1. The Chapter President shall be the Chief Executive Officer and Chairperson of the Chapter Board of Directors. The Chapter President shall have, subject to the advice, direction, and control of the Chapter Board of Directors, general charge of the Chapter business. The Chapter President shall jointly execute with the Chapter Secretary all contracts and instruments which have first been approved by the Chapter Board of Directors. The Chapter President may call any Special Meeting of the Members of the Chapter Board of Directors and/or general Chapter Membership. In case of the absence or disability of the Chapter Treasurer, the Chapter President may execute checks for expenditures authorized by the Chapter Board of Directors. In such circumstances, either the Chapter Vice President or Chapter Secretary shall be called upon to co-execute such checks.
2. The Chapter Vice President shall be vested with all the powers and authority of the Chapter President and shall perform the duties of the Chapter President in the case of the Chapter President's absence, disability, or inability, for any reason. The Chapter Vice President shall also perform such duties connected with the operations of the Chapter at the suggestion or direction of the Chapter President.

The Chapter Vice President may annually recruit a certified public accountant or an appropriate group of Chapter Members to verify that the financial records of the Chapter are in order. The Board of Directors can determine how they want the report to be delivered, written or oral.

3. The Chapter Secretary shall have the responsibility to take and publish minutes of all meetings. The Chapter Secretary is responsible for publishing notice of all regularly scheduled Membership and Chapter Board of Directors Meetings. Additionally, the Chapter Secretary is also responsible for publishing notice of Special Membership Meetings. The Chapter Secretary, with the assistance of the Chapter Membership Chairperson, shall keep a Chapter Membership Book, Roster or Record showing the name of each Chapter Member.

The Chapter Secretary shall also be responsible for maintaining the currency and security of the original copies of the Chapter Bylaws, Non-profit Incorporation documents, tax-exemption documents, Federal Employer Identification Number (FEIN), and any other documents, books, papers, and records as the Chapter Officers or Chapter Board of Directors direct. The Chapter Secretary shall jointly execute, along with the Chapter President, all contracts and instruments that have been first approved by the Chapter Board of Directors. The Chapter Secretary shall perform all other duties incident to the Office of Chapter Secretary, subject to the control of the Chapter President and the Chapter Board of Directors.

4. The Chapter Treasurer shall execute all checks authorized by the Chapter Board of Directors. The Chapter Treasurer shall receive and deposit all funds in a financial institution recognized by the Federal Deposit Insurance Corporation (FDIC) (for U.S. Chapters), and approved by the Chapter Board of Directors. The Chapter Treasurer shall also account for all receipts, disbursements, and the balance of funds on hand. The Chapter Treasurer shall perform all other duties subject to the control of the Chapter President and the Chapter Board of Directors. The Chapter Treasurer shall ensure the Chapter obtains and maintains a Federal Employer Identification Number (FEIN). The Chapter Treasurer shall be responsible for the accurate maintenance of all insurance records, including the proper application, binding, and premium payment for all necessary insurance required by the Experimental Aircraft Association, Incorporated. By resolution of the Chapter Board of Directors, the Chapter may require joint signatures on all checks drawn on Chapter accounts.

Article IX. Chapter Board of Directors

1. The business and property of the Chapter shall be conducted and controlled by the Chapter Board of Directors.
2. The Chapter Board of Directors shall consist of the following:
  - a. Class I Director: Class I Directors shall be the Chapter President, Chapter Vice President, Chapter Secretary, and Chapter Treasurer.
  - b. Class II Director: Class II Directors shall be three (3) to nine (9) additional members elected to the position of Class II Director.
  - c. The term of office for the Chapter Board of Directors shall be one (1) year.

Note: Chapters may choose to use a 2-year term for Chapter Board of Directors.

3. The Chapter President shall preside over the Chapter Board of Directors as its Chairperson.
4. In case of a vacancy on the Chapter Board of Directors, the Chapter President may appoint a replacement, subject to the approval of a majority of the Chapter Board of Directors.
5. Meetings of the Chapter Board of Directors may be called at any time by the Chapter President or by a two-thirds (2/3) majority of the Chapter Board of Directors.
6. Notice of Meetings of the Chapter Board of Directors, stating the location, time, and purpose of the meeting shall be mailed or personally given to each Member of the Chapter Board of Directors at least 48 hours prior to the time of the meeting. If all of the Members of the Chapter Board of Directors are present at a meeting, any business of the organization may be transacted without previous notice of the meeting.
7. A simple majority of the Chapter Board of Directors, at least two (2) of which shall be Executive Officers, shall constitute a quorum of the Chapter Board of Directors.
8. Each Member of the Chapter Board of Directors shall serve as a Board Member without compensation.
9. The Chapter Board of Directors shall have the power and authority to enforce all rules and regulations pertaining to the use and operation of the Chapter's property.

Article X. Vacancies (Chapter President, Chapter Vice President, Chapter Secretary, Chapter Treasurer)

If the office of Chapter President, Chapter Vice President, Chapter Secretary, or Chapter Treasurer become vacant for any reason, the Chapter Board of Directors shall elect a successor who shall hold the office for the remainder of the normal term, or at the option of the Chapter Board of Directors, hold a special election to fill the vacancy(s).

Article XI. Elections

1. The Chapter President may appoint a Nominating Committee made up of at least three (3) Chapter Members. The appointment of the Nominating Committee shall take place no later than July.
2. The appointments to the Nominating Committee shall be announced to the Chapter Members at the regular meeting in July, or earlier if a Nominating Committee has been formed at an earlier date. In addition, the names of the Chapter Members appointed to the Nominating Committee shall be published in the next Chapter Newsletter.
3. Beginning in July, the Nominating Committee shall canvas the current Chapter Officers and Directors to determine if they wish to seek re-election to their current position or be nominated for any other position. The Nominating Committee shall also canvas the Chapter Members of all committees and groups to seek those who may be interested in an elected position. Further, the Nominating Committee shall make themselves available to the Chapter Membership seeking any Chapter Members who may be interested and who are eligible to run for an elected position.
4. At the October Chapter Membership Meeting the Nominating Committee shall present to the Chapter Membership the nominations they have obtained. In addition, open nominations will be accepted from the Chapter Members during the October Chapter Membership Meeting.

5. Once all nominations have been received, a slate of nominees may be posted at the regular meeting place, or any place deemed appropriate by the Nominating Committee, and published in the Chapter Newsletter.
6. Elections of Chapter Officers and Chapter Board of Directors will take place at the November Chapter Membership Meeting. Voting shall be done by written ballot and three (3) Chapter Members appointed by the Chapter Board of Directors shall conduct and monitor the election. All ballots will be counted and confirmed by the monitors and the results of the election announced to the members present. If deemed appropriate by the members, the Chapter Secretary shall be responsible for the development and implementation of a process that will offer absent eligible voting members the opportunity to vote by proxy. Such process shall be reviewed and approved by the Chapter Board of Directors prior to its use.
7. All newly elected Chapter Officers and Chapter Board of Directors shall assume their responsibilities at the December Chapter Membership Meeting, but no later than January 1.

*The following three Articles; "Transition of Leadership", "Financial Reports", and "Facilities, Tools and Other Assets" are optional items, which Chapter may wish to include or delete. These are only suggested Articles for Chapter Bylaws.*

Article XII. Transition of Leadership

1. The Chapter Membership recognizes the importance of a smooth transition of Chapter Leadership. Therefore, subsequent to the election of Chapter Officers and Chapter Board of Directors, the incumbent and newly elected Chapter Officers and Chapter Board of Directors shall organize and hold a transition meeting wherein all Chapter records and information will be passed on to the newly elected Chapter Officers and Chapter Board of Directors.
2. During the transition meeting, the newly elected Chapter Officers and the Chapter Board of Directors shall review the Chapter Bylaws, and the Chapter Goals, Mission and Vision Statements, Non-Profit Incorporation documents, tax status, and insurance policies to ensure they are clearly known and understood.
3. During the transition meeting the newly elected Chapter Officers and Chapter Board of Directors shall review the incorporation documents to ensure the Chapter is current in all government obligations and the Chapter is properly incorporated.
4. During the transition meeting the newly elected Chapter Officers and Directors shall review and submit the Chapter Status Report to the EAA Chapter Office at EAA Headquarters, and ensure that all proper notifications have been forwarded to the EAA Chapter Office at EAA Headquarters as prescribed.
5. During the transition meeting the newly elected Chapter Officers and Chapter Board of Directors shall review the insurance requirements specified by EAA and ensure that all proper insurance coverage has been arranged through the appropriate programs of the Experimental Aircraft Association.



Article XIII. Financial Reports

1. The Chapter Treasurer shall prepare a quarterly and an annual financial statement and present each report on the financial status to the Chapter Membership. The Chapter Board of Directors will determine the form of the report, either written or oral. The Chapter Board of Directors will also determine the method of the report, either by presentation at a Chapter Membership Meeting or by Chapter Newsletter.
2. The Chapter Board of Directors, under the direction of the Chapter Vice President, shall arrange annually to have the financial records and practices of the Chapter verified. The Chapter Board of Directors shall make available a copy of the written report to the Chapter Membership. The Chapter Board of Directors will review any recommendations for changes in book keeping procedures and shall take appropriate steps to implement any reasonable recommendations.

Article XIV. Facilities, Tools, and Other Assets

1. The Chapter Officers and the Chapter Board of Directors shall ensure all facilities, tools, and other assets of the Chapter are properly insured or protected against loss.
2. A Chapter Officer or Chapter Director will serve on appropriate committees to properly manage the Chapter's facilities, tools, and other assets.

Article XV. Chapter Nominating Committee

The Chapter Nomination Committee, which is appointed by the Chapter President, shall consist of 3 to 5 Chapter Members. The purpose of the Chapter Nomination Committee is to conduct the annual process of recruiting nominees for the various elected positions within the Chapter and report these nominations to the Membership of the Chapter. Further, the Chapter Nomination Committee shall follow the guidelines in the Chapter Transition Plan Part 1.

Article XVI. Chapter Membership Committee

The Chapter Membership Committee, which is appointed by the Chapter Board of Directors, shall consist of a few Chapter Members, probably about 4 or 5 Chapter Members. The purpose of this Committee should be to keep accurate records on the current Membership of the Chapter through a detailed Chapter Membership Roster. The Chapter Membership Committee shall also look for ways to retain existing EAA and Chapter Members. Further, the Chapter Membership Committee shall look for opportunities to recruit new EAA and Chapter Members, including keeping an ample quantity of EAA and Chapter Membership Application Forms and any other materials that will assist in the retention and recruitment of EAA and Chapter Members.

Article XVII. Organization Committees

The Chapter Board of Directors may establish committees, as it deems necessary. Any committees established by the Chapter Board of Directors shall be responsible for reporting their activities directly to the Chapter Board of Directors.

*Please Note: Any Chapter, at their own discretion may include the following Article.*

Article XVIII. Dispute Resolution

In the event a dispute arises within the Chapter, a written petition, endorsed by a quorum of Chapter Members, as defined in Article VI, may request intervention by the Chapter Office Staff of the Experimental Aircraft Association, Inc. concerning a dispute within the Chapter. The Chapter Membership will cooperate completely and fully with the Chapter Office Staff of the Experimental Aircraft Association, in the resolution process. In the event a dispute occurs within the Chapter, and it cannot be resolved with the assistance of the Chapter Office Staff of the Experimental Aircraft Association, Inc. and it is determined by the Chapter Office Staff of the Experimental Aircraft Association, Inc. to be at an impasse, the Chapter agrees and acknowledges the authority and responsibility of the Experimental Aircraft Association, Inc. to remove the Chapter Charter. If the Chapter Charter is removed, the Chapter will have no further recognition or affiliation with the Experimental Aircraft Association, Inc.

Article XIX. Amendments

The Bylaws of the Chapter may be, amended, or new Bylaws adopted at any Regular Chapter Meeting of the Chapter Members called for that purpose. Amended or new Bylaws must be passed by a not less than eighty percent (80%) majority vote of the Chapter Members eligible to vote and present at such meeting in person or by proxy.

Article XX. Dissolution

The Chapter may be dissolved by a two-thirds majority vote of the voting Chapter Members. If the Chapter is dissolved, the Chapter President is responsible for ensuring that all Chapter debts and obligations are paid, and the proper disposition of all Chapter records are sent to the EAA Chapter Office at EAA Headquarters, P.O. Box 3086, Oshkosh, Wisconsin, 54903-3086. The Chapter President is also responsible for the disposition of all Chapter materials and assets that shall be donated to another non-profit organization. (The EAA and EAA Foundation are both non-profit organizations).

Article XXI. Chapter Charter Authorization

The Chapter accepts and acknowledges that the Chapter has been granted a conditional Charter under the authority of the Experimental Aircraft Association, Incorporated. Further the Chapter accepts and acknowledges that the privileges granted to the Chapter, under a conditional Charter, may be withdrawn in the event the Chapter fails in any way or manner to meet the requirements of the Chapter Charter of the Experimental Aircraft Association, Incorporated. In the event that the Experimental Aircraft Association, Incorporated withdraws the conditional Charter of the Chapter, the Chapter agrees to cease using any reference whatsoever to itself as a Charter Chapter of the Experimental Aircraft Association, Incorporated.

Acknowledgement and Acceptance on behalf of:

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*(Insert Chapter Name)*

Chapter President's Signature \_\_\_\_\_ Date \_\_\_\_\_

Chapter Vice President's Signature \_\_\_\_\_ Date \_\_\_\_\_

Chapter Secretary's Signature \_\_\_\_\_ Date \_\_\_\_\_

Chapter Treasurer's Signature \_\_\_\_\_ Date \_\_\_\_\_

EAA Chapter Office Representative's Signature (Oshkosh)

\_\_\_\_\_ Date \_\_\_\_\_

## **Chapter Committee Guidelines**

This is a guide to help establish additional committees within your Chapter. Please refer to the guidelines below, or call the EAA Chapter Office, for assistance in forming new committees within your Chapter.

Please remember that if a committee is established in a Chapter, a corresponding Article must be added to the Chapter Bylaws upon establishing the committee.

### **Chapter Welcome Committee**

The Chapter Welcoming Committee should be established to make visitors and new Chapter Members feel welcome at Chapter Meetings and events. For example the committee could assign a member of the Welcoming Committee to do a brief interview with each visitor at your Chapter Membership Meetings and then introduce the person during the meeting. The Welcoming Committee could also assign a member of the committee to make contact with each new Chapter Member in order to explain the background and mission of the Chapter.

The Chapter Welcome Committee should consist of several Chapter Members. The exact number of this committee is not particularly important, however the Chapter Welcome Committee, unlike some Chapter Committees, can function successfully with a larger number of Chapter Members. A larger number of Chapter Members on the Chapter Welcome Committee will spread the workload and get more Chapter Members involved in the responsibilities of the Committee.

The main functions of the Chapter welcome Committee should include, but not be limited to the following responsibilities and tasks. The Chapter Welcome Committee should:

- Make sure all of the Chapter Welcome Committee Members are easily identifiable by a special nametag, shirt, or some other identification.
- Make sure a few Chapter Welcome Committee Members attend all Chapter functions to welcome guests and Chapter Members.
- Make sure a sign-in sheet is on-hand at all Chapter functions so Chapter Members may sign-in and the names, addresses, and other important information may be obtained from any guests.
- Make sure all guests are welcomed and introduced to the entire Chapter at some appropriate point during the Chapter activity.
- Make sure the names and addresses of all guests are given to the Chapter Newsletter Editor and Chapter Web Editor to ensure guests will be recognized in both publications and the guests will receive the next few issues of the Chapter Newsletter, either by mail or electronically if the Chapter publishes an electronic Chapter Newsletter.

### Chapter Flying Activities Committee

The Chapter Flying Activities Committee should include 3 or 4 Chapter Members. The focus of the Chapter Flying Activities Committee should be to develop and maintain a list of planned flying activities for the Chapter Members to participate in on a regular basis. Chapter flying activities may include but not be limited to:

- Regular (monthly or bi-monthly) fly-outs
- Cross-country rally's
- Orientation flights

*Note: If the Chapter establishes a Chapter Young Eagles Committee, Chapter Flying Start Committee, and/or Chapter Fly-In Committee, it is not necessary for these areas of responsibility to fall under the Chapter Flying Activities Committee.*

### Chapter Young Eagles Committee

The Chapter Young Eagles Committee is a very important Chapter Committee and should consist of as many Chapter Members as necessary to ensure the Chapter has a strong and active commitment to the EAA Young Eagles Program.

The main functions of the Chapter Young Eagles Committee should include, but not be limited to:

- Planning and conducting, with the assistance and participation of Chapter Members, one or more annual EAA Young Eagles Rallies
- Assisting individual Chapter Members in their efforts to recruit and fly EAA Young Eagles by maintaining an ample supply of EAA Young Eagle materials

### Chapter Flying Start Committee

The Chapter Flying Start Committee is an equally important Chapter Committee and should consist of as many Chapter Members as necessary to ensure the Chapter is actively involved in helping interested people begin and continue their trek towards the successful achievement of learning to fly. The Chapter Flying Start Committee should:

- Work to establish a positive and constructive relationship with the local flight school
- Plan and conduct at least one Flying Start Presentation annually
- Encourage all individuals who attend a Flying Start Presentation to also join the Chapter and EAA to better support the individuals quest towards learning to fly

### Chapter Fly-In Committee

The Chapter Fly-In Committee should consist of several Chapter Members as outlined in the Chapter Fly-In Guidelines. The individual posts on the Chapter Fly-In Committee will depend on the various activities planned for the Chapter Fly-In.

### Chapter Social Committee

The Chapter Social Committee is a very important Chapter Committee and should include 4 or 5 Chapter Members. The purpose of the Chapter Social Committee is to look for, plan, and conduct various social activities that will bolster the “fun factor” of the Chapter. Some of the various Chapter social activities under the direction of the Chapter Social Committee should include, but not be limited to:

- Annual Chapter Banquet or Celebration
- Monthly Chapter Birthday Party (to celebrate the birthdays of Chapter Members)
- Chapter Hangar Dance
- Chapter Cook-Out, (maybe coordinated with the Chapter Flying Activities Committee if held at an airport)
- Refreshments at monthly Chapter Gatherings

### Chapter Membership Recognition Committee

The Chapter Membership Recognition Committee may only need a few Chapter Members, perhaps 2 or 3 Chapter members, however this may be one of the most important Chapter Committees. The purpose of the Chapter Membership Recognition Committee is to plan and present the various Chapter Membership Awards and when appropriate submit the names of appropriate individuals to the EAA Chapter Office for recognition by the entire EAA Membership. Such awards may include:

- Chapter Spark Plug Award
- Chapter Spirit Award
- Outstanding Chapter Member Award
- Best Membership Recruiter Award
- New Pilot Award
- New Homebuilt Aircraft Award
- New Ultralight Award
- New Aircraft Restoration Award
- Outstanding Chapter Volunteer Award
- Outstanding Young Eagles Ground Volunteer Award
- Chapter 100 Young Eagles Flown Award
- Etc., etc., etc...

### Chapter Builder Support Group Committee

The Chapter Builders Support Group Committee should include 3 or 4 Chapter Members who's main focus is to keep builders in touch with each other and look for ways builders can share ideas and information. Typically the Chapter Builders Support Group Committee will organize the following activities:

- Builders Shop Visits
- Builders Demonstrations
- Guest Speakers on Building Topics
- Technical Counselor and Flight Advisor Training Sessions
- Group Aircraft Inspection Training Sessions

### Chapter Safety Committee

The Chapter Safety Committee does not have to be a very large Committee, maybe 2 or 3 Chapter Members, however this Committee is very important. The purpose of the Chapter Safety Committee is to ensure all Chapter activities are conducted in a safe manner and that proper safety rules are in place and followed. In addition, the Chapter Safety Committee should make sure to make a presentation on safety to the Member of the Chapter twice each year and they should try at least four times each year to include a short article on safety in the Chapter Newsletter.

### Chapter Finance Committee

The Chapter Finance Committee should include 3 Chapter Members, including the Chapter Treasurer. The Chapter Finance Committee should conduct the following activities:

- Assist the various Chairmen of Chapter Committees in the proper development and adherence to annual budgets
- Create an annual Chapter Budget for submission and approval by the Chapter Board of Directors
- Ensure that proper financial procedures are followed at all times as respects to the finances of the Chapter
- Conduct an annual internal audit of Chapter finances and arrange an outside audit of Chapter finances when directed by the Chapter Board of Directors

### Chapter Scholarship Committee

The Chapter Scholarship Committee should include 3 or 4 Chapter Members. The purpose of the Chapter Scholarship Committee is:

- Maintain or develop scholarships the Chapter Membership agrees to support
- Identify needed funds for scholarships and present ideas to the Chapter Fundraising Committee to raise funds for scholarships
- Administer scholarships the Chapter has agreed to support

### Chapter Fundraising Committee

The Chapter Fundraising Committee should include 5 or 6 Chapter Members. The purpose of the Chapter Fundraising Committee is to direct and work with the entire Chapter Membership on the successful raising of funds through special projects and activities.

## **Non-Profit Incorporation Guidelines**

It is a requirement that all EAA Chapters (including Chapters and Squadrons of EAA Divisions) accomplish and maintain non-profit incorporation with their appropriate local government agency.

*You must first be approved for a Chapter Number by the EAA Chapter Office prior to getting incorporated.*

For most Chapters in the U.S., the Secretary of States Office will handle non-profit incorporation. Forms for obtaining non-profit incorporation will be provided by each State, in fact, many States provide these forms and information on their official web sites. To find a phone listing for the appropriate State Office you may want to look in your local phone directory under “\_\_\_ State of \_\_\_” (example “Wisconsin State of –”).

Requirements for filling out the necessary forms to accomplish non-profit status differ from state to state. In most cases you will be able to refer to the Chapter Bylaws to help fill out these forms. If you have any questions you may always call the EAA Chapter Office for assistance at 800-236-4800, ext. 4876.

Foreign Chapters must also contact the appropriate government agency to accomplish non-profit status. The methods and procedures necessary to accomplish Non-profit status differs greatly from country to country. Please refer to the Chapter Bylaws for help in filling out any required forms. If a Chapter has already been formed in your country the EAA Chapter Office may help in contacting the correct government agency to request the proper forms.

**Please remember that the incorporated name of the Chapter must exactly reflect the Chapter Name stated in the Chapter Bylaws. An Example of an acceptable Chapter Name: Fun Flyers EAA Chapter 2222, Inc. Note, the Chapter Number must be part of the Chapter Name.**

In most cases non-profit incorporation must be maintained annually or biannually by filling out the correct forms, and in most cases paying a small fee. If you are unsure of your Chapters non-profit status you should contact the appropriate government agency to confirm your non-profit status.

**Please provide a copy of your initial and any subsequent incorporation documents to the EAA Chapter Office.**



## Section 3

### Section 3.1

#### **PROHIBITED ACTIVITIES**

“**Prohibited Activities**”, those words together have such a negative sound to them. Unfortunately, they are negative. However, at the same time they are sound reasons why Chapters are not permitted to conduct certain activities. Why? Two reasons:

1. Some activities are either not insurable or even though they are insurable they still pose significant risk exposures such that they may result in a claim against your Chapter and EAA so significant that the results could permanently harm the Chapter (including the Members) and EAA (your association).
2. Some activities are far broader and diverse from the core mission and competencies of your Chapter’s abilities. Even though today there may be skills and talents within your Chapter to manage a fuel cooperative, those talents are not certain to stay over the long term as Chapter Members come and go. This is just one example.

For the two reasons outlined above, the following activities are not permitted activities for a Chapter:

- **Owning and Operating a Flying Club or Flight Instruction Aircraft or Ultralight**  
(Note: Project aircraft are okay as long as the aircraft is being built as an educational project, including enjoyment, with the end result being the sale of the aircraft to raise money for the Chapter.)
- **Conducting Aircraft Maintenance for Hire (any compensation)**
- **Owning or Operating a Fuel Service or Fuel Cooperative**
- **Owning or Operating an Airport, Airpark, or Airfield**
- **Establishing a Subsidiary or Linked Corporation which conducts any of the Prohibited Activities**  
(Note: A subsidiary or linked corporation would be any corporation requiring the transfer of assets to the Chapters, authorizes Chapter oversight, or links Chapter Membership requirements.)
- **Conducting Field or Airport Runway, Taxiway, Runway Lighting, or Taxiway Lighting Maintenance**  
(Note: There are some additional limitations and prohibited activities outlined in the insurance section of this handbook. Please carefully read this section of the handbook.)

If your Chapter has any questions about insurance or prohibited activities, please contact the Chapter Office.

## Section 4

### **KEEPING YOUR CHAPTER CURRENT AND IN GOOD STANDING**

This section of the Chapter Handbook is designed to guide Chapters through the necessary steps of maintaining their active status. Annually there are requirements that must be met in order for the Chapter to remain in good standing with EAA Headquarters. This portion of the Chapter Handbook reviews these requirements.

This section contains the following information:

#### **Section 4 – Table of Contents**

Section 4.1	Annual Checklist
Section 4.2	Status Report Form

## ANNUAL CHECKLIST

In order to remain an active Chapter in good standing, Chapters are required to maintain the following:

- All Chapters must complete and return their **Chapter Status Report, Administration Fee, Roster and Charter Renewal Agreement** each year by December 15<sup>th</sup>.
- All US and Canadian Chapters must complete and return their **Chapter Insurance Form** and premium each year by December 15<sup>th</sup>. (A separate mailing will come to your Chapter with all necessary forms)
- All local Chapter Members **must be** EAA Members. (See Section 2 on Bylaws for information on Membership Guidelines. See Section 5 pertaining to the Chapter New Member Bonus Program that provides a membership application and details the financial incentive for Chapters to sign up new members.)
- All Chapters must maintain current **non-profit incorporation** within their state, or other governmental territory as applicable. A current copy of the Incorporation Certificate must be filed with the Chapter Office.
- All Chapters must make sure the Chapter Office has a current copy of the Chapter **Bylaws** as well as any amendments.
- Chapters must send in copies of the **minutes** from their regular membership meetings and Board of Directors meetings to the Chapter Office on a regular basis. These may be included in the Chapter Newsletter.
- If the Chapter has a **letter of determination for tax exempt status** from the IRS, the Chapter must make sure the Chapter Office has a copy of this letter along with the Chapter's original application for this exemption.
- All Chapters in the United States must obtain and maintain an **Employer I.D. Number** (If your Chapter does not have an Employer I.D.#, please go ahead and complete the form and return it to the IRS. You can obtain a SS4 form from the IRS or the Chapter Office. File for the Employee ID # and notify the Chapter Office with the Employer I.D. number.)
- It is imperative that Chapters review the **Chapter Transition** plans in section 2 of this Chapter Handbook. This is essential in preparing for both the annual election and the actual transition of officers.

All the above conditions must be met on an annual basis in order for a Chapter to remain in good standing.



## CHAPTER STATUS REPORT

**EAA IAC WAR U/L VIN**

**Chapter/Squadron Number:** \_\_\_\_\_

(Please circle one.)

**Location:** (Please include City, State & Country):  
\_\_\_\_\_

**Meeting Date:** \_\_\_\_\_

**Meeting Time:** \_\_\_\_\_

**Meeting Location:** \_\_\_\_\_

**Federal Employer ID #:** \_\_\_\_\_ **# of Members in Chapter/Squadron:** \_\_\_\_\_

**Chapter/Squadron E-Mail Address:** \_\_\_\_\_

**Chapter/Squadron Web Address:** \_\_\_\_\_

EAA and Division Membership Numbers MUST be provided for each of the officers listed. Remember, all Chapter members must be EAA national members. Please include area codes in the telephone numbers.  
**COMPLETE THIS REPORT AND RETURN TO THE EAA CHAPTER OFFICE.**

**PRESIDENT:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Fax Number: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

**VICE PRESIDENT:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**SECRETARY:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**TREASURER:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**NEWSLETTER EDITOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**WEB EDITOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**Please Complete:**

**EAA IAC WAR U/L VIN**  
(Please circle one.)

**Chapter/Squadron Number:** \_\_\_\_\_

**MEMBERSHIP COORDINATOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**YE COORDINATOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**FLYING START COORDINATOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**TECH COUNSELOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**FLIGHT ADVISOR:** \_\_\_\_\_ **EAA #:** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

**INSURANCE CONTACT:** \_\_\_\_\_ **EAA#** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

\_\_\_\_\_ : \_\_\_\_\_ **EAA#** \_\_\_\_\_  
Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

*If additional positions need to be listed for the Chapter or Squadron, please include the information on a separate piece of paper and return it along with this form.*

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**Please return this form to:**

**EAA  
Chapter Office  
P.O. Box 3086  
Oshkosh, WI 54903-3086**

*If you have any questions, please call the Chapter Office at 1/888-322- 4636, Ext. 4876.*

## Section 5

### **CHAPTER INSURANCE**

This section of the Handbook contains important information pertaining to the Chapter Insurance Program. It outlines important details concerning events, applications, coverage and specific requirements that have been established for the program.

This section contains the following information:

#### **Section 5 – Chapter Insurance**

- Section 5.1 Introduction
- Section 5.2 Chapter Class 1,2,3 Events
- Section 5.3 Chapter Non-Owned Aircraft Liability Insurance/Orientation Rides
- Section 5.4 Young Eagles Insurance
- Section 5.5 Duties after an Accident or Loss
- Section 5.6 Chapter/Squadron Event Insurance Form
- Section 5.7 Young Eagles Rally Notice Form
- Section 5.8 EAA, Warbird, IAC, Vintage, Ultralight Chapter/Squadron Events Allowed Under Insurance Policy
- Section 5.9 Orientation Ride Form
- Section 5.10 Passenger Release of Liability and Flight Authorization Form
- Section 5.11 Most Frequently Asked Questions (FAQ)

## **INTRODUCTION**

### **GENERAL LIABILITY INSURANCE FOR CHAPTERS**

The general liability insurance policy for Chapters is designed to provide liability coverage for alleged negligence on the part of the Chapter. This policy provides general liability coverage seven days a week, 24 hours a day, and extends liability coverage to Chapters that own or lease a clubhouse, hangar, or both, within certain size limitations. This coverage also provides liability coverage for meetings, Class 1 Events, mall shows, etc. It provides insurance to the Chapter, its members, officers, directors, and volunteers. ***Participation in the EAA Chapter Insurance Program is mandatory for all United States and Canadian Chapters. It is unavailable to all other international Chapters***

The general liability policy can be endorsed, for an additional charge, to cover special events, i.e., Class 2 and 3 Events. An application for this endorsement is located in this section of the handbook.

#### **CHAPTER CLASS 1,2, & 3 EVENTS**

The Chapter general liability insurance provides coverage for Chapter Class 1 Events, without any additional charge. This policy may be endorsed to provide coverage for Class 2 and 3 Airshows (see next section for description of Class 2 and 3 Airshows), which will result in an additional premium charge.

To clarify what is covered and what is not, and to explain the different classes of events as described in our insurance policies, the next section will outline the details of Class 1, 2, and 3 Events. Keep in mind these are just an outline of coverages.

## **CHAPTER CLASS 1,2 AND 3 EVENTS**

**Class 1 Event:** A Class 1 Event is a Chapter event with flight activities limited to transportation into and out of the insured premises (airport or airfield) by the participants (i.e., breakfast flights, event picnics, aviation meetings, swap meets, airport awareness days, or museum tours). Other activities, which are insured under a Class 1, are Young Eagle Rallies, Poker Runs, Spot Landing Contests, Radio Controlled Aircraft Demonstrations, Tethered Hot Air Balloon Rides, Organized Fly-bys, and Orientation Rides. IAC Chapter "Critique/Practice Sessions" are covered, provided all IAC Contest guidelines are observed. (For clarification on IAC guidelines, please refer to the IAC Procedures Manual, or call the IAC Executive Office at 920/426-6574.) Ultralight Pilot Proficiency Events are also covered under the Class 1 Program.

NOTE: All Pilot Proficiency Events must be done in accordance with the Ultralight Pilot Proficiency Event Guidelines to be properly covered as a Class 1 Event. Copies of the Ultralight Pilot Proficiency Event Guidelines are available upon request from the EAA Chapter Office and on the web at: <http://www.eaa.org/chapters/activities/flyins.asp>.

An event Application form must be completed and returned for all Class 1 Events.

To activate coverage for a Class 1 Event, the Chapter must complete the Event Insurance Application form and return it to the EAA Chapter Office, **at least 30 DAYS prior to the Event.** An example of this form is in the back of this section of the handbook. Please make copies of this form and keep the original in this handbook.

**Class 2 Events:** include any and all activities described in Class 1 Events plus aerobatic demonstrations on a gratis basis. An additional premium is charged for a Class 2 Event. For a quotation, **you must complete the Application form, which can be found in this section of the Chapter Handbook.**

**Class 3 Events:** include any and all activities described under Class 1 and Class 2 Events plus aerobatic demonstrations or airshow performances by paid professional performers. An additional premium is charged for a Class 3 Event. For a quotation, **you must complete the Application form, which can be found in this Section of the Chapter Handbook.**

When your Chapter is planning a Class 2 or Class 3 Event, you must complete the Event Insurance Application form and send it to EAA. A copy of this application is included in the back of this section of the handbook. If your Chapter needs additional copies of this application, please contact the EAA Chapter Office or copy the form in this section of your handbook. If your Chapter has any questions about the activities you have planned at your Event, please contact the EAA Chapter Office 920/426-4876 for clarification and assistance.



## **CHAPTER NON-OWNED AIRCRAFT LIABILITY INSURANCE**

The purpose of this coverage is to protect the Chapter, its officers, directors and members from claims that may arise when the Chapter organizes Orientation Rides at Chapter events. Anyone who owns, rents, or borrows an aircraft, should carry their own aircraft liability insurance for the operation or ownership of an aircraft. When a Chapter becomes involved in organizing Orientation rides at Chapter meetings, Chapter Events or any other Chapter event, the pilot's insurance for the aircraft may not provide insurance coverage to the Chapter, unless the policy has been amended to list the Chapter as an additional insured. The limit of your liability coverage is \$1,000,000 for bodily injury or property damage. EAA pays all premiums for this coverage. The individual Chapters pay nothing. Chapters may request a donation for Orientation Rides as long as the requirements under FAR Part 91.146 are met.

There are some procedures, which the Chapter must follow, for this insurance to apply. The steps are simple! They are as follows:

1. Prior to the date of the orientation rides, each Chapter must complete the Chapter Orientation Ride Information forms. These forms are included in section 5.9 of the handbook. Once this form is completed, it is to be sent to the EAA Risk Management Office before the rides take place.
2. The Chapter Board of Directors or Executive Committee must pass a resolution approving the orientation rides to be given at a Chapter event. A copy of the Chapter Board of Directors or Executive Committee meeting minutes documenting the resolution must accompany the Chapter Orientation Ride Information Form, and both need to be sent to the EAA Risk Management prior to the date of the Orientation Rides.

There are limitations on the types of aircraft your Chapter can use when giving Orientation Rides. Aircraft used in the Chapter Orientation Ride Program must be as follows:

- Single Engine
- Fixed Wing
- Standard or Experimental Category
- Four Seats Total per Aircraft or Less

**\*\*All Aircraft/Pilots Must Have Liability Insurance in Place**

\*An Experimental aircraft cannot be used in accordance with FAR 91.146 if a fee and/or donation is being accepted for the Orientation Ride.

\*\*Any aircraft used for the Orientation Ride program, must carry aircraft liability insurance.

## **YOUNG EAGLES NON-OWNED AIRCRAFT LIABILITY INSURANCE**

The Young Eagles Program has sparked a tremendous amount of excitement among EAA members worldwide. Because many of the Young Eagle Rallies are held to introduce youngsters to aviation, local EAA Chapters will sponsor them. It is important that necessary steps are taken to protect EAA, its members and Chapters for reasonable liabilities that go along with a program such as this. Please submit a Class 1 Notice Form for all Young Eagle Rallies.

### **YOUNG EAGLES RALLY EVENT NOTICE FORM**

If additional activities will be conducted in conjunction with the event, the Chapter Event Insurance Application must be completed

EAA has non-owned aircraft liability insurance in place that will provide coverage in the amount of \$1,000,000 per occurrence for bodily injury and property damage arising out of a Chapter sanctioned Young Eagle Rally. This coverage only applies to aircraft that are not owned by the Chapter. There are no restrictions on the types of aircraft that can be used. **This coverage does not apply if the Chapter or the individual EAA Member participating charges or receives any payment for the use of their airplane.**

### **YOUNG EAGLES EXCESS AIRCRAFT COVERAGE**

To address some of the concerns expressed by individual EAA Members, EAA put in place an excess general liability insurance policy. This policy provides excess passenger liability insurance coverage for individual EAA Members who fly their own aircraft or rented aircraft in conjunction with the Young Eagle Program. The underlying requirement is that the primary owned aircraft liability insurance or renters liability insurance have at least \$100,000 per passenger seat coverage. If this underlying coverage is in place, then the EAA excess passenger liability insurance coverage will provide an excess \$1,000,000 per occurrence over and above the underlying limit of coverage. Of course, the restriction against charging Young Eagles for their ride still applies. If you have any questions about this insurance coverage, please contact the Young Eagles Office at 920/426-4831.

### **DUTIES AFTER AN ACCIDENT OR LOSS**

Notify us Promptly -	EAA Risk Management Department	920/426-4822
		920/426-6106
		920/231-3548
		920/379-4822
	EAA Chapter Office	920/426-4876
		920/426-6847
		920/426-6867

The notice should include the time, place and circumstances. It should include names and addresses of witnesses and injured persons.



## **CHAPTER/SQUADRON EVENT FORM**

THE FOLLOWING APPLICATION MUST BE  
COMPLETED AND RETURNED FOR ALL  
CHAPTER/SQUADRON ACTIVITIES, INCLUDING FLY-  
INS AND AIRSHOWS

1. Send completed application to: EAA Risk Management  
P.O. Box 3086  
Oshkosh, WI 54903-3086  
  
Fax to: (920) 426-6865
2. As you complete this application, indicate N/A (Not Applicable) to any items that do not apply to your event.
3. If there is an additional premium for your Chapter/Squadron event, a quotation will follow directly from EAA Risk Management. The quote will be subject to your review and approval. If requested, a certificate of insurance will be sent for Class 1 events. This insurance program, while administered by EAA, is underwritten by several aviation insurance companies.
4. Upon your acceptance of the quotation you must advise EAA Risk Management by mail, fax, email or by phone to issue the policy. Policy issuance will be made immediately and coverage confirmation mailed to you along with your invoice.
5. Payment of the invoice (when applicable) should be made directly to EAA and mailed to EAA Risk Management Department, P.O. Box 3086, Oshkosh, WI 54903-3086, Attention: Tammy Thomas.

**NOTE: All applications must be received by EAA's Risk Management Department 30 days in advance of the event.**

In the event you have any questions relative to this insurance, please contact EAA Risk Management at 920/426-6106, or email [tthomas@eaa.org](mailto:tthomas@eaa.org).



**INSURANCE APPLICATION FOR ALL CHAPTER/SQUADRON ACTIVITIES INCLUDING FLY-INS, AND AIRSHOWS**  
**EXPERIMENTAL AIRCRAFT ASSOCIATION, INC.**

1. A. Name of Event: \_\_\_\_\_

B. EAA Chapter/Squadron requesting coverage (Insured):

Division: EAA UL Vintage Warbird IAC Chapter# \_\_\_\_\_

Chapter Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Person \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_ Fax \_\_\_\_\_

C. Which best describes your Chapter's/Squadron's role in this event:

\_\_\_\_\_ Sole Organization: Chapter/Squadron is the only organization involved in the planning and conduct of the event.

\_\_\_\_\_ Co-Sponsor: Chapter/Squadron is one of the organizations planning and conducting the event.

\_\_\_\_\_ Participant: Chapter/Squadron will provide an activity (i.e. breakfast, lunch, Young Eagles, Chapter/Squadron display) at the event that the Chapter/Squadron is not the sole organizer or co-sponsor.

\_\_\_\_\_ Other: Please describe in detail, including careful clarification of Chapter or Squadron's role in planning, meetings, revenue, and promotion. **Your insurance cannot be arranged without this information.**

\_\_\_\_\_  
\_\_\_\_\_

D. Are you the primary sponsor? \_\_\_\_\_ Yes \_\_\_\_\_ No

If not, who is the primary sponsor? What will they provide at the event (role/activities)?

\_\_\_\_\_  
\_\_\_\_\_

Is the primary sponsor incorporated? \_\_\_\_\_ Yes \_\_\_\_\_ No

**(Please note: It is mandatory for all EAA Chapters to be incorporated and remain current with their respective Secretary of State's office.)**

E. Name any other co-sponsor, person or organization requesting additional insured status under this insurance. (Use reverse side if more than two)

Name \_\_\_\_\_ Name \_\_\_\_\_

Address \_\_\_\_\_ Address \_\_\_\_\_

\_\_\_\_\_

Role\* \_\_\_\_\_ Role\* \_\_\_\_\_

\*(Role to event (ex. owner of airport, FBO providing use of hangar space, etc.))

2. How many volunteers will participate/support this event? \_\_\_\_\_

List all individuals participating in this event that will be compensated, or reimbursed for their expenses – provide details on compensation or reimbursements:

\_\_\_\_\_

\_\_\_\_\_

3. List all contracts/leases/agreements that you have or will sign for this event – forward copies of each with this application:

\_\_\_\_\_

\_\_\_\_\_

4. List all items or products you or any additional insured will sell at this event (as listed in item #1E of this application): Describe \_\_\_\_\_

\_\_\_\_\_

5. A. Dates of event for which insurance is requested:

Event Dates: from \_\_\_\_\_ to \_\_\_\_\_

Rain Dates (if applicable): from \_\_\_\_\_ to \_\_\_\_\_

B. Number of set-up days: \_\_\_\_\_ Number of tear-down days: \_\_\_\_\_

C. Admission: Adult EAA Member \$ \_\_\_\_\_ (daily) \$ \_\_\_\_\_ (event)

Adult Non-Member \$ \_\_\_\_\_ (daily) \$ \_\_\_\_\_ (event)

Children \$ \_\_\_\_\_ (daily) \$ \_\_\_\_\_ (event)

Auto Parking Fee: \$ \_\_\_\_\_ Camping Fee: \$ \_\_\_\_\_

D. Number of Vendors/Exhibitors participating in your event: \_\_\_\_\_

Fee per Vendor/Exhibitor: \$ \_\_\_\_\_

6. Location of event (the premises to be insured):

\_\_\_\_\_

\_\_\_\_\_

7. Estimate of Attendance: EAA Members \_\_\_\_\_ General Public \_\_\_\_\_

**THE FOLLOWING ACTIVITIES ARE NOT COVERED BY THIS INSURANCE AND ARE NOT PERMITTED AT ANY EAA FLY-IN EVENT.**

- Racing of any kind
- Flour Bombing
- Balloon Breaking
- Ribbon Cutting
- Night AirShows
- Sale of Alcoholic Beverages
- Simulated Aerial Combat
- Wing Walking
- Endurance Flights Involving Fuel Exhaustion
- Pyrotechnics/Fireworks

8. A. Please circle which activities will be included in the event. Indicate with a CO, S or C/S who is responsible for each.

**\*\*C/S=Chapter/Squadron**

**\*\*CO=Co-Sponsor**

**\*\*S=Sponsor**

- |  |  |
|--|--|
| <input type="checkbox"/> Pancake Breakfast   | <input type="checkbox"/> Aerobatic Demonstrations by Non-Paid Performers*  |
| <input type="checkbox"/> Young Eagle Rides   | <input type="checkbox"/> Food Vendors  |
| <input type="checkbox"/> Cook-out  | <input type="checkbox"/> Aerobatic Demonstrations by Paid Performers*  |
| <input type="checkbox"/> Hot Air Balloons*   | <input type="checkbox"/> Aviation Exhibitors   |
| <input type="checkbox"/> Parachute Jumpers*  | <input type="checkbox"/> Formation Flights*  |
| <input type="checkbox"/> Awards Banquet  | <input type="checkbox"/> Ride/Hopping/Site Seeing Rides – commercial rides for a fee (balloons, aircraft, helicopters)*      |
| <input type="checkbox"/> Radio Controlled Aircraft Demonstrations*   | <input type="checkbox"/> Aircraft Manufacturer Demonstration Rides*  |
| <input type="checkbox"/> Fly-Market/Parts Mart   | <input type="checkbox"/> Car, Motorcycle, Farm Equipment Display   |
| <input type="checkbox"/> Spot Landing Contest  | <input type="checkbox"/> Ultralight Pilot Proficiency Events   |
| <input type="checkbox"/> Warbird Demonstrations*   | <input type="checkbox"/> Car, Motorcycle Farm Equipment Demonstration, contest or racing*                                    |
| <input type="checkbox"/> Poker Run   | <input type="checkbox"/> Workshops   |
| <input type="checkbox"/> Non-Aviation Exhibitors   | <input type="checkbox"/> Aircraft Static Displays  |
| <input type="checkbox"/> Fly-Bys (showcase-parade of flight)   | <input type="checkbox"/> Orientation Rides for Adults – given by Chapter members a fee/donation see FAR 91.146 Air Tour Rule |
| <input type="checkbox"/> Orientation Rides for Adults – given by Chapter members without acceptance of a fee or donation |  |

**\*NOTE: Attach Certificates of Insurance for Each Participant marked with an \*, including the Chapter as an additional insured and indicate on certificate which activity they are providing (Required support documentation should accompany application form).**

---Please be advised, before we can honor any request to list your event in any EAA publication or on the website or issue the certificate of insurance for your event, we must receive the necessary certificate(s) of insurance for any activity marked with an \* in 8. A. above.---

9. Please provide a detailed description of your event. Please use another sheet if necessary. If any other events other than those listed above (aviation or non-aviation) are planned, please list and describe.

\_\_\_\_\_

\_\_\_\_\_

10. List all vehicles (indicating number of each) and how they will be used during the event:

- Automobile (cars and trucks), use \_\_\_\_\_
- Buses, use \_\_\_\_\_
- Golf carts, gators, etc, use \_\_\_\_\_
- Tractors and wagons, use \_\_\_\_\_
- All terrain vehicles, use \_\_\_\_\_
- Motorcycles, scooters, use \_\_\_\_\_
- Other, use \_\_\_\_\_

**PROVIDE A CERTIFICATE OF INSURANCE ON EACH VEHICLE**

11. Who is responsible for fire/rescue/police/security services?

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12. List all “event sponsors” and their level of sponsorship. NOTE: For this question “event sponsor” means any business or organization that is providing services, products, or cash in exchange for promotional recognition or acknowledgement, i.e. car dealer providing vehicles, grocery store providing food, etc.

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<b>IS A HARD COPY OF THE CERTIFICATE OF INSURANCE NEEDED?</b>	<b>No</b>	<b>Yes</b>
	If yes, VIA: Fax	Mail Email
If no, would you like an email confirming coverage for your event?	<b>No</b>	<b>Yes</b>

The undersigned declares that to the best of his/her knowledge and belief that the statements set forth herein are true. Incomplete or inaccurate information may impair insurance coverage. This application does not commit the insurers or EAA to any liability nor make the applicant liable for any premium unless and until the company agrees to effect this insurance.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative of Chapter or Squadron

**In the event you have any questions relative to this insurance, please contact EAA Risk Management at 920/426-6106, or email [tthomas@eaa.org](mailto:tthomas@eaa.org).**



**The space below may be used should you wish to include any additional information.**

Date of Event \_\_\_\_\_

**CHAPTER/SQUADRON YOUNG EAGLES RALLY NOTICE FORM**

This Young Eagles Rally Form **MUST** be returned to the EAA Risk Management Office at least **2 WEEKS** prior to the Young Eagles Rally to ensure your Chapter/Squadron will have the proper insurance in place. This form is to be used only for Chapter/Squadron sponsored Young Eagle Rallies.

CHAPTER# _____	EAA <input type="checkbox"/>	VAA <input type="checkbox"/>	IAC <input type="checkbox"/>	WB <input type="checkbox"/>	UL <input type="checkbox"/>
----------------	------------------------------	------------------------------	------------------------------	-----------------------------	-----------------------------

IS A HARD COPY OF THE CERTIFICATE OF INSURANCE NECESSARY? NO  YES   
 If yes, VIA: Fax Mail Email

NAME OF CONTACT PERSON \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

TELEPHONE NUMBER \_\_\_\_\_ FAX \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_

HAS ANYONE REQUESTED ADDITIONAL INSURED STATUS? NO  YES 

LIST ANYONE REQUESTING ADDITIONAL INSURED STATUS AND **WHY** THEY ARE REQUESTING ADDITIONAL INSURED STATUS?

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

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

ARE ANY OF THE ABOVE CO-SPONSORS OF YOUR EVENT? NO  YES 

NAME OF RALLY \_\_\_\_\_

DATE OF RALLY \_\_\_\_\_ RAIN DATE \_\_\_\_\_

SET UP &amp; TEAR DOWN DATES \_\_\_\_\_

NAME AND LOCATION OF AIRPORT TO BE INSURED \_\_\_\_\_

ESTIMATE OF ATTENDANCE: EAA MEMBERS \_\_\_\_\_ PUBLIC \_\_\_\_\_

ACTIVITIES PLANNED: (List **ALL SPECIFIC** activities taking place.)

If any activities are included in this rally in addition to Young Eagle activities, an additional application **MUST** be completed. Please contact EAA Risk Management to obtain this application.

This Chapter/Squadron Young Eagles Rally Notice Form is an important part of the Young Eagles & Chapter/Squadron Insurance Program. **Missing or incorrect information may affect coverage.** Please make sure all information is correct and accurate.

SUBMITTED BY: \_\_\_\_\_ DATE: \_\_\_\_\_  
 (Signature)

NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

This notice is to be completed and sent to the EAA Risk Management Department **2 WEEKS** prior to any Chapter/Squadron sponsored Young Eagles Flight Rally. All pilots providing Young Eagle rides **MUST** be current EAA members.

**RETURN THIS NOTICE FORM TO: EAA RISK MANAGEMENT DEPARTMENT, PO BOX**  
**3086, OSHKOSH, WI 54903-3086 FAX (920) 426-6560**



**EAA CHAPTER/SQUADRON EVENTS  
ALLOWED UNDER  
INSURANCE PLAN**

- |   |  |
|---|--|
| 1. Young Eagle Flights-Rides-Rallies                              | 17. Various Tours                            |
| 2. Static Display   | 18. Orientation Rides                        |
| 3. Chapter Fly-Ins and Drive-Ins                                  | 19. Flying Start Rides                       |
| 4. Chapter Breakfasts, Lunches, Dinners                           | 20. Spot Landing Contests                    |
| 5. Chapter picnics and cookouts                                   | 21. Tethered Hot Air Balloons                |
| 6. Chapter meetings   | 22. Schools, Classes,<br>Seminars, Workshops |
| 7. RC Demonstrations  | 23. Camping                                  |
| 8. Scheduled Fly-bys  | 24. Aircraft Judging                         |
| 9. Poker Runs   | 25. Exhibits                                 |
| 10. Mall Shows-Handing out literature                             | 26. Flight Simulators                        |
| 11. Swap Meets  | 27. Ground School                            |
| 12. Fly Markets   | 28. Parachuting                              |
| 13. Airport Aviation Days   |  |
| 14. Poker Run   |  |
| 15. For IAC Chapters Only – Critical Practice Sessions            |  |
| 16. For Ultralight/Light Sport Plane Category Proficiency Events: |  |
| a. Torpedo Run  | d. Cross Country Flights                     |
| b. Bean Bag Drop  | e. Power On Accuracy Landings                |
| c. Spot Landing Contest   | f. Power Off Accuracy Landings               |

h h **NOTE: THE FOLLOWING EVENTS ARE NOT EAA CHAPTER COVERED EVENTS:**  
RACING OF ANY KIND, FLOUR BOMBING, BALLOON BREAKING, RIBBON CUTTING,  
SIMULATED AERIAL COMBAT, ENDURANCE FLIGHTS INVOLVING FUEL EXHAUSTION,  
FIREWORKS, EXPLOSIVES, OR PYROTECHNICS.

h h h **CHAPTERS PLANNING ON CONDUCTING ANY FLY-IN MUST FILL OUT A  
CHAPTER FLY-IN OR AIRSHOW INSURANCE APPLICATION. THESE FORMS  
MUST BE SUBMITTED 30 DAYS PRIOR TO THE EVENT TAKING PLACE.**

**EAA CHAPTER ORIENTATION RIDE INFORMATION FORM**

Chapter #: \_\_\_\_\_ Date: \_\_\_\_\_

Time: \_\_\_\_\_

Chapter Address: \_\_\_\_\_

\_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone Number : \_\_\_\_\_

Event: \_\_\_\_\_

Place: \_\_\_\_\_

**Aircraft Information:** (\*\*Remember: If accepting a fee and/or donation, use Experimental Aircraft is prohibited per FAR 91.146)

Year	Make and Model	Seats	Owner
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Pilot Information:**

Name	Cert #	Med. Cert. & Date	BFR	Total Time
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\_\_\_\_\_

**NOTE: INCLUDE A COPY OF THE CHAPTER MINUTES WITH RESOLUTION TO HAVE ORIENTATION RIDES.**

**Return Form TO: EAA Risk Management, PO Box 3086, Oshkosh, WI 54903**

EAA CHAPTER \_\_\_\_\_

**PASSENGER RELEASE OF LIABILITY AND FLIGHT AUTHORIZATION FORM**

In consideration of the donation made (if applicable) to EAA Chapter \_\_\_\_\_ and the airplane ride provided by the Chapter, the undersigned person/passenger, or parent/guardian, on behalf of the person/passenger listed below, their personal representatives, heirs and estates hereby agree to release, hold harmless, and indemnify EAA Chapter \_\_\_\_\_, its Officers, Director, Members, Volunteers; the Experimental Aircraft Association, Inc., EAA Aviation Foundation, Inc., and its divisions, any of their officers, directors, agents, employees, volunteers, co-sponsors, or affiliated organizations, for any and all bodily injury, including death or property damage, as a result of entering, exiting, or riding on board any aircraft owned and/or operated by, or on behalf of the aforesaid organizations.

Name of Person/Passenger: \_\_\_\_\_

\* Signature of Person/Passenger or Parent and/or Guardian: \_\_\_\_\_

\_\_\_\_\_

\*\* Name of Person/Passenger or Parent and/or Guardian: \_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

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

Witness: \_\_\_\_\_

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

\* Signature and name of person/passenger for anyone 18 years of age or older. Signature and name of Parent and/or Guardian for anyone under 18 years of age.

\*\* Personal Identification Required.

**Return Form To: EAA Risk Management, PO Box 3086, Oshkosh, WI 54903**

**INSURANCE**  
**Most Frequently Asked Questions (FAQ)**

**FAQ: What does the Chapter General Liability Insurance cover?**

The Chapter Insurance policy is **General Liability Insurance** that protects the Chapter, Officers and Members in the event that claims are made against the Chapter as a result of their role or actions in an activity or event. This insurance coverage is **ground liability only** and does not cover the Chapter for activities once they have taken off of the ground in their aircraft and it does not protect the Chapter's assets in terms of their hangar, tools, etc. For coverage concerning their clubhouse/hangar the Chapter needs to acquire separate policies that pertain to their building(s) and contents. If the Chapter stores aircraft within their hangar, Hangarkeeper's Insurance would be required in order to cover the aircraft in the event of a fire, etc.

**FAQ: Can our Chapter request additional insured status for other organizations or individuals in conjunction with a Chapter activity?**

Yes, additional insured status is available for local airports where your Chapter activity is being conducted. Other organizations may request additional insured status but there is an additional premium and the organization will be subject to the approval of Corporate Risk Management Office. Additional insured status means that you are sharing the Chapter Insurance Program with other organizations. We must be very selective in doing so in order to protect the plan for the Chapters.

**FAQ: Can our Chapter conduct fly-bys at a Chapter Class 1 event?**

The answer is yes and no. The Chapter Insurance program has been expanded in the past year to include General Liability Coverage for Fly-bys conducted at Chapter Events. However, this expanded coverage does stipulate certain limitations. The fly-bys should only be conducted by recreational type of aircraft and does not include large military aircraft such as DC-3's, bombers, etc. Formation flying is prohibited.

In addition, the fly-bys are only to be conducted over a runway where the attendees of the event are held in a separate secured area. It is not acceptable to conduct the fly-by over a parade, stadium, etc. where people are directly under the aircraft. Your Chapter Insurance Program does NOT provide coverage for these fly-bys and they are not allowed at Chapter events.

Aerobatic demonstrations are NEVER allowed at Class 1 Chapter activities. Demonstrations that include paid or unpaid performers or even a single aircraft doing a few loops or rolls prior to departure are not covered. If your Chapter wishes to conduct or bring in an aerobatic demonstration at an event your Chapter will be required to complete an insurance application at least 30 days in advance of the event in order to determine if insurance coverage will be available under Class 2/3 insurance (an additional premium will be required).

### **FAQ: Can our Chapter have an airworthy aircraft (flying club) within our Chapter?**

Chapters are not set up to own or operate flying clubs within the Chapter structure. If your Chapter has completed an airplane project and is planning on using it as “flying club” type of aircraft, then it needs to be taken outside of the Chapter in a separate corporation prior to test flying it, insuring it, licensing it, etc. If your Chapter has acquired or is thinking about acquiring an airworthy plane a separate corporation must be set up outside of the Chapter, with no direct ties back to the Chapter and/or EAA (i.e. membership in the Chapter or EAA should not be required to join the flying club).

It may be difficult to understand from a Chapter’s point of view why an aviation based association such as EAA does not allow flying clubs to exist within Chapters. There are several reasons. First is the liability exposure that is created. Unfortunately in this day and age, should an incident occur where a claim is filed, the Chapter, its officers, members and EAA could all be responsible. In order to protect the interests of the Chapter and EAA we require that the flying club remain outside of the Chapter Structure. Second, flying clubs have proven to be divisive within Chapters. There will be members within the Chapter that have no interest in flying the plane, do not want the liability exposure and do not want the Chapter’s funds going to support it. With a separate flying club established, those that are interested can participate and those that do not want to, don’t have to.

A good reference document for people interested in setting up flying club is the book “Keeping the Peace in Partnerships – A Guide to Aircraft Co-Ownership” by Bruce Luedeman. This book can be ordered through membership services at 1-800-564-6322.

### **FAQ: Can our Chapter own, operate, manage or maintain an airport or airpark?**

A Chapter is not set up to be the owner, manager or operator of an airport or airpark. It exceeds the boundaries of the Chapter structure. It is acceptable for a Chapter to rent out hangar space, in their own Chapter hangar, to fellow Chapter Members only but it is recommended that additional insurance be acquired to cover these activities. Chapters should not own or manage a hangar complex and be the managing authority over them. In addition, the Chapters should not be conducting fueling operations, maintaining runways, leasing aircraft, conducting flight instruction, maintaining runway lights, collecting money or performing any other managerial functions of the airport/airpark.

Why is it inappropriate for the Chapter to be involved in the above-mentioned activities? The Chapter Insurance Program does not extend coverage for these actions. In addition, there is a problem with short-term versus long-term goals and resources of the Chapter. Perhaps at this point in time there is an enthusiastic group that wants to spend their time and money to manage the airport. But what happens in five or ten years when your Chapter suddenly finds itself unable to keep up with the maintenance or the funds required to repair a runway or building is beyond the financial capabilities of the Chapter? Finally, a Chapter is meant to be fun and running an airport/airpark requires a great deal of effort that many of the Chapter Members may not be interested in participating in, thus limiting the scope of the Chapter to a very narrow focus.

### **FAQ: Can our Chapter participate in or organize an airshow as a Class 1 Event?**

Chapters can participate in an air show by putting up an informational booth, manning a food tent, putting on a static display and still fall within the boundaries of a regular Class 1 Event. However, they need to be aware that if they become more closely involved in the formal planning sessions of the event, profit sharing, organizing acts, then they have moved themselves from a participant role to that of a sponsor. Sponsoring an air show exceeds the boundaries of a Class 1 Event and the Chapter will be required to obtain additional insurance in order to protect themselves for the more involved role that the Chapter is playing in the event. The Chapter should make sure to complete an insurance application at a minimum of 30 days prior to the event to determine what insurance and additional premiums will be required.

Exposure is also incurred by being listed as a co-sponsor of an event on posters and promotional materials. If the Chapter has not formally taken on this role they do not want to be listed as a sponsor, rather they should be listed as a participant and recognized for their limited role (i.e. hamburger stand).

### **FAQ: Can our Chapter give rides at our Chapter fly-in that are in addition to the Young Eagle rides?**

Yes, your Chapter can give rides at a Chapter function. Additional paperwork is required for insurance purposes. Your Chapter will need to complete the **Event Insurance Application** as with any other event. In addition a **Passenger Release of Liability** form will need to be completed by each person taking a ride and a **Chapter Orientation Ride Information Form** for the Chapter will need to be completed in advance. All of the forms are available in the Chapter Handbook, on the web and by calling the Chapter Office. Keep in mind this is for Chapter Members giving the rides.

If your Chapter has a commercial operator coming to the event giving rides then the Chapter, officers, members and EAA need to be listed on the operators policy as an **additional insured** and proof of this additional insured status should be forwarded to the Corporate Risk Management Office a minimum of one week prior to the event. For specific wording required on the paperwork, contact the Corporate Risk Manager at 800-236-4800 ext. 4822.

If your Chapter is giving rides away for a donation then you will also be required to complete the Drug Testing Exemption information as required by the FAA.

### **FAQ: What should we do if we have a change in facility mid-year or are building a facility?**

If your Chapter acquires a clubhouse or hangar mid-year, an updated annual insurance application should be filed that denotes the new facility. There will be an additional premium amount based on the type of facility. For an application, please contact the Corporate Risk Management Office at 800-236-4800 ext. 4822. If your Chapter does not update its insurance information as noted above and a claim is filed, the Chapter will not have the appropriate coverage and could possibly be with no coverage.

If your Chapter is building or physically moving a facility, then your Chapter needs to be insured for these activities. Your annual General Liability Policy does not cover your Chapter for these additional responsibilities. Should someone get hurt at the building site, there would not be any insurance in place to cover the potential liability. Therefore, the Chapter needs to acquire additional insurance for this time period to cover these acts. Please contact the Corporate Risk Management Office at the above number, prior to beginning construction, to obtain the necessary coverage.

### **FAQ: Can we participate in a parade, do candy drops and bomb drops?**

The Chapters insurance policy does not cover parades. If your Chapter plans to have a float in a parade then the auto insurance of the car/truck pulling the float would be responsible. Also, if an aircraft is on the float, then the owner of the plane would need to have coverage under their insurance policy.

Candy drops can be conducted at Chapter activities if strict guidelines are followed. The crowd must be held back behind a restricted area. Under no circumstances should the candy be dropped directly over the crowd. The candy cannot be dropped on a runway (active or temporarily closed) but should be dropped in a separate open area.

Bomb drops are not allowed at Chapter events. The concern is in the fact that pilots tend to substantially cut back on power and altitude to do the drops and thereby significantly increase the risk of an accident. Only **Ultralights** may conduct a beanbag toss over a target using the official Pilot Proficiency Guidelines.

### **FAQ: Can our Chapter participate in or co-sponsor a Wings and Wheels type of event?**

Events that bring together cars and airplanes can be terrific events and good opportunities for Chapters to work together with local organizations. A Wings and Wheels type of event is fine as long as a few guidelines are followed. The cars should be restricted to static display only. Proficiency events, burnouts and high-speed demonstrations may not be conducted. The Chapter's insurance policy is an aviation based policy and does not provide for automobile coverage in these cases. If the car club participating in the event does have insurance and lists the Chapter, its members and officers as additional insured, then these activities may possibly take place. The Chapter must request the additional insured status, receive a certificate from the car clubs insurance company (mail a copy to the EAA Corporate Risk Management Office) and complete an Event Insurance Application a minimum of 30 days in advance. Please be aware, that if your Chapter is being listed as a co-sponsor of the event, the car club must have their own insurance in order to conduct any of these activities.

### **FAQ: Can we have Introductory Flight Lessons in an Ultralight at our event?**

An Introductory Flight Lesson can be conducted at an event, in an ultralight, as long as certain criteria are met. The Instructor must be registered with EAA, USUA or ASC and be operating with a two-place training exemption. The ultralight and training flight must be registered with

EAA, USUA or ASC. The Chapter should make sure to file an Event Insurance Application that includes all activities being conducted at the event, including the Introductory Flight Lessons. Keep in mind that the Chapter Insurance will only cover the Chapter in any negligence. The instructor will not be covered for the flight.



## Section 6

### **CHAPTER NEW MEMBER BONUS PROGRAM (\$10 REBATE)**

This section includes information on the New Members Bonus Program. This program provides Chapters the opportunity to increase their Chapter Treasury when they recruit new EAA Members. Bringing new EAA Members into the Chapter is a great way to expand Chapter Membership, thereby helping to secure the Chapter's future. New EAA Members can bring the Chapter renewed vitality and a host of new ideas, energy and enthusiasm.

The additional funds put into the Chapter Treasury are available to be used as the Chapter sees fit. Most Chapters have a long wish list of projects, materials and social gatherings that they would like to do. Adding to the Chapter Treasury will hopefully help make some of these aspirations more easily attainable.

This section contains the following information:

#### **Section 6 – Table of Contents**

Section 6.1	Instructions for Using the Chapter New Member Bonus Program
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## CHAPTER MEMBERSHIP REBATE PROGRAM INSTRUCTIONS

Chapters have always been leaders in recruiting new EAA Members. By using the Chapter New Member Bonus Program, Chapters receive a \$10 bonus for each new **\$40 EAA Member** or **\$56 EAA International Member** that they recruit.

The EAA Membership Application Chapter Rebate Form is the proper form to use. Contact the Chapter Office toll free at 888-322-4636 ext. 4876 or e-mail [chapters@eaa.org](mailto:chapters@eaa.org) to request Rebate Forms. The Membership Application allows membership payments to be made with cash, check, or credit card. Please make sure all checks are made payable to EAA.

Complete the entire form, **including your Chapter number in the space provided in the upper right hand corner of the EAA Membership Application Chapter Rebate Form.** When using the two-part form, return the top copy of the form to the EAA Chapter Office, and give the back copy to the new member.

If individuals call-in their membership (1-800-564-6322) using a major credit card, make sure they mention the Chapter Number to the EAA Membership Services Representative, so the Chapter will receive the bonus. No bonuses will be applied retroactive to the original application for membership.

The bonus checks will be mailed on an annual basis to the Chapter Treasurer. All Chapters located in the United States must have a **Federal Employer Identification Number (FEIN)** in order to receive a rebate check. Please contact the Member and Chapter Relations Office if you are unsure if your Chapter FEIN is on file with the us. Please remember, that in order for the Chapter to be eligible to receive the rebate, the Chapter must also be in good standing by the report run date.

If your Chapter needs some direction on how to start recruiting new members, there are several reference papers available which include some helpful suggestions. The reference papers are available through the Chapter's area of the EAA website at:

<http://www.eaa.org/chapters/resources/reference/default.asp>

If your Chapter has any questions regarding the Chapter New Member Bonus Program, please contact the EAA Member and Chapter Relations Office toll free at 888-322-4636, ext. 4876, or send an e-mail to *chapters@eaa.org*.

## Section 7

### **CHAPTER REFERENCE PAPERS**

This section of the Chapter Handbook is designed to give Chapters an overview of the Reference Papers available to them through the Chapter Office. The papers focus on the most common issues that Chapters face when running their Chapter. They were written by the Chapter Advisory Council, Chapter Office Staff and others with the intent to help Chapters become more successful.

When you receive the resource papers feel free to make copies for anyone in your Chapter who wants them. Newsletter Editors, feel free to reproduce them in your Chapter Newsletters. Please give credit to the author when the author is listed.

Reference Papers are available by going to the EAA Website. Here you will be able to read the papers and print them off for your personal use. They are found on the web at:

<http://www.eaa.org/chapters/resources/reference/default.asp>

#### **Section 7 – Table of Contents**

Section 7.1	Reference Papers List and Descriptions
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## Chapter Reference Papers

### List and Descriptions

#### **(1) A Quick Primer on Working with the Media**

At one time or another, nearly every Chapter will work with the media. As one of the organized groups of aviators in your community – sometimes the only one – you are a vital link between general aviation and the public. A good relationship with the media can pay great dividends in promoting, enhancing or even saving aviation facilities and activities in your area.

#### **(2) A Primer on Chapter Hangars**

This paper contains information on How to get started with a Chapter Facility, An Example of a Common Hangar License, An Example of a Common Hangar Lease, and Utilization of Facilities and Equipment. It takes a look at why a Chapter may want to build a hangar and various thoughts and considerations that should take place.

#### **(3) Alert the Media! How to Publicize Chapter Events**

Many Chapters hold fly-ins, Young Eagles Rallies and activities throughout the year. The obvious question is how to inform the community of these events, and the answer is just as obvious – alert the media! A more vexing question is how do you issue this alert? Where and to whom do you send the news release? When do you send it? What should you say? And how can you be sure the media will publicize the event?

#### **(4) Attracting and Retaining New Chapter Members**

In order for a Chapter to bring in new members and retain their existing membership it is essential to demonstrate that the Chapter provides both enjoyment and value to its members. A friendly, active environment fosters loyalty among existing members and attracts new ones. This paper takes a look at recruiting activities and materials, follow-up with prospective members, welcoming committees and other tools that both create awareness of the Chapter and reinforces the importance of first impressions.

#### **(5) Board Manual Basics**

A good manual is an excellent tool in organizing the daily activities of a Chapter. It ensures that all board members have current information, the tools to perform their jobs and a good source of organized information. This paper serves as a guideline as to what information should be included in both a basic manual and a more comprehensive one.

#### **(6) Chapter Fly-In Guidelines**

The task of planning and executing a fly-in can be a challenge. The purpose of this paper is to provide that process for planning a fly-in along with guidelines and suggestions to assure Chapters enjoy successful and safe events.

#### **(7) Chapters & Airports...What is the right role for a Chapter?**

If someone came to your Chapter and offered the Chapter an airport, it might sound like a fantastic opportunity on the surface. However, as we will discuss here, there are many responsibilities that don't come to the surface immediately. This paper will discuss Chapters, airports, and the right role for Chapter when it comes to owning or operating an airport.

### **(8) Creating an EAA Chapter Web Site**

This paper was written by EAA Chapter 1000. It provides some basic information including critical requirements, how-to tips, style pointers and more!

### **(9) Double the Attendance at Every Chapter Event!**

Many Chapters are looking for ways to increase the involvement in Chapter activities. This paper looks at the benefits of increasing the interest of the family members of your Chapter members. Offering varied programs that would be of interest to women, men and children can help make Chapter life a real family experience. Looking for ways to increase involvement across the board can be a real boost to Chapter membership.

### **(10) EAA Pilot Proficiency Events - Chapters**

The purpose of the EAA Pilot Proficiency Events is to allow EAA Chapters (including Divisional Chapters) the opportunity to host an event that permits pilots who fly all types of aircraft, a chance to enjoy the fun of flying while sharpening pilot skills and aeronautical knowledge. During all of these events the first and foremost rule for participation, is safety.

### **(11) Earning Tax-Exempt Status for EAA Chapters**

Just because an organization operates without profit doesn't make it officially tax-exempt. Because tax day just happened, the idea of not having to pay federal income tax is probably pretty appealing about now. Under specific federal tax rules certain organizations can realize this benefit.

### **(12) Effective Chapter Leadership**

The success of any Chapter depends on many factors, but the most critical element will always be the caliber of its leadership. In business and industry, leaders are carefully selected, trained and developed—a long term process.

### **(13) Flying Clubs**

Many Chapter Members are looking for more economical ways to participate in flying. This paper explores the dynamics of flying clubs, the Chapter structure and additional sources of information for those Members considering forming a flying club.

### **(14) Foolproof Follow-Through**

Organizing activities and projects through committees is a terrific way to get the Chapter membership involved. This document helps Chapters to keep their committees on track and to achieve results. It also shows how good records will help make planning for future projects and activities easier.

### **(15) Guidelines for Chapter Accounting and Financial Operations**

Maintaining proper accounting and financial records is essential in the successful operation of a Chapter. This paper reviews the some key principles that should be reviewed: Accurate financial records, Understandable financial statements, Timely financial statements, Sound budget procedures, Accurate and appropriate financial controls and Annual outside audit of records, practices and procedures.

### **(16) Guidelines for Chapter Fundraising**

In order for Chapters to continue to maintain their facilities, plan and promote events, and further recreational aviation they generally must have a Chapter treasury that gives them the means to accomplish these goals. What this means for most Chapters is Fundraising. This reference paper helps Chapters explore some key points that need to be addressed before launching into a fundraising activity. Why Plan a Fundraiser?, What's the Need?, How do we get the Entire Chapter Involved?, Making it a "FUN-Raiser"!, Make a Plan, and Celebrate Your Efforts!

### **(17) How to Interpret Your Chapter's Direction**

Chapter Leaders have a responsibility to identify and understand the interests and goals of the Chapter. Accurately identifying these key elements can help insure participation of members at events and help solidify the future of the Chapter. When Chapter members agree on the vision of the Chapter they are much more supportive in the planning and executing of its activities. This paper gives individuals the opportunity to think about how interpreting a Chapter's direction influences the day-to-day operations of the group.

### **(18) Is the Airport Manager Your Friend?**

Many Chapters have a great relationship with their Airport Manager. They work together and have a mutual give and take relationship. Other Chapters could stand to enhance their relationship with their Airport Manager. This paper is a stepping stone in developing and improving this relationship. It gives the Chapter an opportunity to look at what they can do to be a "good tenant" and the benefits of developing a good working relationship.

### **(19) Listen to What the Members of Your Chapter are Saying!**

It can be difficult to find out what Chapter members want. The key to bringing out their support of activities and events is to find out their ideas, concerns and wishes. One of the most challenging tasks is to extract this information from the membership. The key is to try a variety of communication methods to let the voice of your Chapter be heard. Listening to your members can be done through a variety of channels: questionnaires, brainstorming sessions, small and large group discussions and non-verbal body language and messages. This reference paper highlights various means of exploring your Chapter's interests and needs.

### **(20) Newsletter Editor Reference Paper**

The Chapter Newsletter is a key communication tool. The Newsletter Editor has a very important role and it can be a learning experience for those who have not had the opportunity to create and distribute a newsletter before. This paper is an excellent guide for Newsletter Editors. It talks about the role of the editor, how to find news, what are key ingredients in an article, layout tips and a whole lot more.

### **(21) Participant..Yes, Co-Sponsor...No Way**

Success and recognition are good things. Chapters have earned their recognition from being able to put on successful local fly-ins. Chapters have a lot going for them and sometimes these achievements and resources attract the attention of other organizations that may wish to tap into the resources of the Chapter to put on a larger event (airshow). This isn't always a bad thing, however there are issues to be considered or concerned about in a Chapter becomes a partner or co-sponsor of an event.

## **(22) A Partnership in Safety**

Discover how your Chapter can work with the FAA, airport management and the local community. This paper looks at how problems were solved concerning an aerobatic box in a local community.

## **(23) Programs for Monthly Chapter Get Togethers**

One of the most difficult tasks that Chapters can face is coming up with monthly programs. This reference paper gives Chapters some pointers on how to make it a less overwhelming task and how to make it more rewarding for the entire Chapter. The paper reviews such ideas as defining how many programs are needed, how to share the responsibility and what other factors are involved in making it a successful Chapter meeting.

## **(24) Publicity – A Key to Your Chapter’s Success**

Publicizing your Chapter can make a huge difference in the success of your planned events and to the continual growth of your Chapter. Publicity can seem a bit overwhelming to some Chapters, what medium to use, what message to send, ... This paper help Chapters to find out what role publicity plays and how to successfully use it to its utmost advantage. Finding the right medium, timing of the message and the right words to convey are all explored. Getting the most from your publicity efforts is everyone’s goal.

## **(25) Purposes and Roles of EAA Chapters**

EAA Chapters act as a gateway of information and activities at the local level. EAA Chapters are an important platform for EAA programs. The Chapters also play key roles in the EAA network. They provide Member Interaction, Networking Opportunities, Aviation Activities, a Business Framework for Local Activities, EAA Representation, Communication to EAA Headquarters and Program Implementation. Chapters are an extension of the EAA parent body. This paper reviews their important role.

## **(26) Raffle Guide**

Raffles are a great way to raise money for your Chapter. They work for any size Chapter and can be an extremely cost effective way to have fund raising money for your special needs. This outline can assist your Chapter in getting ready for your raffle.

## **(27) Scholarship Guidelines**

Many Chapters utilize a portion of their annual budge to organize an aviation scholarship for a local recipient. This paper will discuss how to develop and recruit for the scholarship, create an application, how to process the applications, development of an evaluation process and ultimately selection of the award recipient.

## **(28) Strategic Planning for Your Chapter**

The most common traits of successful Chapters are their ability to recognize and recruit dynamic leaders and their real sense of direction. This paper is intended to help Chapters analyze their current situation and plan goals for their future. It reviews the following topics: How to determine your Chapter’s purpose, Where your Chapter would like to be in the future, Analyzing your current situation, Establishing your goals and Determining what is necessary to achieve these goals.

### **(29) Tax-Exempt Status of Your Chapter**

The intent of this reference paper is to give some clarity to the details that the IRS furnishes in the IRS Publication 557 concerning Tax-Exempt Status. This paper is not intended to substitute the official information available from the IRS but to help Chapters understand it better.

### **(30) Tax-Exemption for Your Chapter**

One of the most common questions we hear is how to operate or form an EAA Chapter so that it is tax exempt. There are two provisions of the Internal Revenue Code that allow tax-exempt status. Examining these allows one to develop a general framework on how to acquire it and keep it.

### **(31) Together the FAA and Pilots Make Aviation**

When confronted with issues at a local level the FAA is a great information source and support system. This paper reviews the experiences of a local IAC Chapter and how the FAA helped them to work through a local issue.

### **(32) What is the Relationship Between the Mission and Vision of EAA and the Mission and Vision of Your Chapter?**

EAA offers Chapters support for their local activities and personal objectives. The united vision and mission of EAA are a powerful force. This paper focuses on what the vision and mission of EAA means at a local level and the importance of the local Chapters as an extension of these ideas. It also reiterates the idea that Chapters also need to individualize their mission and vision to meet their unique goals.

### **(33) Where Can Your Chapter Find New Members?**

A common obstacle that many Chapters face is finding new members to enhance their current membership base. This reference article gives the Chapter some concrete ideas to launch their membership efforts. It also gives Chapters an opportunity to think about what draws new members to join.

### **(34) 501(c)3 White Paper**

This paper offers details to the reader concerning IRS tax-exempt status also known as 501(c)(3) and how it relates to Chapter. Topics covered include basic corporation details, what 501(c)(3) is, why your Chapter may need it and how do you get it. It is a basic stepping stone in the process of exploring the idea of obtaining this special tax status.

### **(35) Whose Chapter is it Anyway? (Yours, Mine or Theirs?)**

Being a Chapter Leader is a challenging task. Not only are you responsible for listening to your members but also providing direction and organizational leadership to make things happen. It can be a difficult balancing act. How do you keep the Chapter active and involved without just following your individual agenda? This paper offers some important insight on how to successfully accomplish the goal of providing leadership and making sure that the leadership decisions are reflecting the wishes of the Chapter members.

### **(36) Why Do We Join?**

Is there a difference between joining EAA and your local EAA Chapter? No, not really. Think for a second, what are the benefits or reasons you joined your local Chapter and what were the things you expected when you joined EAA, or maybe you are one of those people that joined one without joining the other?



**(37) Workshop 2001, EAA Chapter Newsletter Editor**

Learn how to write interesting Chapter articles from Scott Spangler, EAA Sport Aviation Editor and former Chapter Newsletter Editor. This paper is filled with tips and hints to make your newsletter even better!

## Section 8

### **EAA HEADQUARTERS AND COUNCIL DIRECTORIES**

This section of the Chapter Handbook is designed to be a quick reference for important contact information for individuals at EAA Headquarters and various councils. It is important for Chapter Members to remember that the EAA Headquarters staff and councils are here to help. Let us know what we can do for you.

Communication information on the following groups is included in this section:

#### **Section 9 – Table of Contents**

Section 8.1	EAA and EAA Division and Affiliate Contacts
Section 8.2	EAA Chapter Advisory Council
Section 8.3	EAA Aeromedical Advisory Council
Section 8.4	EAA Homebuilt Aircraft Council
Section 8.5	EAA Legal Advisory Council
Section 8.6	EAA Ultralight Council

## EAA and EAA Division and Affiliate Contacts

Tom Poberezny President, EAA/EAAAF	(920) 426-4810 <a href="mailto:tpoberezny@eaa.org">tpoberezny@eaa.org</a>
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Katrina Bradshaw Director, Membership Marketing	(920) 426-6836 <a href="mailto:kbradshaw@eaa.org">kbradshaw@eaa.org</a>
Steve Buss Executive Director, Young Eagles Program	(920) 426-5914 <a href="mailto:sbuss@eaa.org">sbuss@eaa.org</a>
Sean Elliott President & CEO, NAFI EAA Director of Aircraft Operations	(920) 426-6801 <a href="mailto:selliott@eaa.org">selliott@eaa.org</a>
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Tammy Thomas  
Insurance Administrator

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Chapter Field Administrator

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[ttoelle@eaa.org](mailto:ttoelle@eaa.org)

Ron Wagner  
Manager, Field Relations

(920) 426-6122  
[rwagner@eaa.org](mailto:rwagner@eaa.org)

## EAA Chapter Advisory Council

The Chapter Advisory Council consists of local Chapter Members that have been very active in their local Chapters through holding of officer positions, committee chairs, and taking of leadership roles. Council members help provide assistance to Chapters in need by providing suggestions and direction by utilizing their own experiences and successes with their local Chapters.

**Alan Shackleton, Chairman (Donna)**

(630) 466-4193 (home)  
[a.shacklton@sbcglobal.net](mailto:a.shacklton@sbcglobal.net)

**Claudette Colwell, Vice Chairman (Steve)**

(530) 621-3408 (phone/fax)  
[colwells@comcast.net](mailto:colwells@comcast.net)

**Bill Johnson (Cathy)**

(770) 928-9042  
[bjohnson@imageinformation.com](mailto:bjohnson@imageinformation.com)

**Steven Krog (Sharon)**

(262) 966-7627 (home)  
[sskrog@aol.com](mailto:sskrog@aol.com)

**John Newman (Cyndy)**

(817) 292-8414 (home phone/fax)  
[jwnewman@flash.net](mailto:jwnewman@flash.net)

## EAA Aeromedical Advisory Council

The EAA Aeromedical Advisory Council provides oversight, guidance, and assistance for EAA's Aeromedical Advisory Program, who act as advocates for EAA members to resolve their specific FAA medical certification issues.

The EAA Aeromedical Advisory Council activities are coordinated through the EAA Aviation Services Department, at 888-EAA-INFO (322-4636), extension 6112.

John D. (Jack) Hastings, M.D.  
Council Chairman  
Tulsa, OK  
**Specialty:** Neurology, AME

Guy D. Baldwin, D.O.  
Tulsa, OK  
**Specialty:** Family Practice, AME

Richard Garrison, M.D.  
Dayton, OH  
**Specialty:** Aerospace & Emergency Medicine, AME

Stephen D. Leonard, M.D.  
Atlanta, GA  
**Specialty:** Vascular Surgery, AME

Charles P. Nicholson, Jr., M.D.  
Concord, NC  
**Specialty:** General Surgery (retired), AME

John Owen, M.D.  
Liberty, MO  
**Specialty:** Family Practice, AME

## **EAA Homebuilt Aircraft Council**

The Homebuilt Aircraft Council was formed to ensure EAA's continued focus on vital programs of benefit to current and future homebuilders. This council of EAA volunteer leaders represents the homebuilder, and will provide direction for programs, services and activities that will add value for you, our members who are dreaming of, building, buying and fly homebuilt aircraft.

**Feel free to contact the council members with your ideas, suggestions and concerns at [hac@eaa.org](mailto:hac@eaa.org).**

### **Doug Kelly**

**Frederick, Maryland**

**Chairman & EAA Board Member**

An experienced homebuilder with two projects to his credit. His first was a Thorp T-18 he purchased already flying. Over the 20 years that he owned it he substantially rebuilt the aircraft. His second is a recently completed Kitfox Model IV called "Micro Mulligan." He has also served as a local Chapter President.

### **Jack Dueck**

**Cremona, Alberta, Canada**

A long-time homebuilder who has served as an EAA Technical Counselor and Flight Advisor for several years. He has built an RV-4 and completely restored an Aeronca 11 AC and a Luscombe 8C. Jack is currently building an RV-9A with his wife Jean. He has been a pilot since 1953 and hold night, multi-engine and IFR ratings. His aeronautical engineering background is a tremendous asset for the council.

### **Joe Gauthier**

**Cromwell, Connecticut**

He has built four homebuilts and is currently working on a GlaStar. An active Technical Counselor and Flight Advisor as well as an A & P, CFII, and NAFI Master Flight Instructor specializing in homebuilt transition, instrument and spin training. He has made 28 first flights in homebuilts. He has been honored with the EAA Major Achievement Award, EAA's President's Award, FAA Region CFI of the year and Safety Counselor of the year.

### **Wally Anderson**

**Eugene, Oregon**

Built both an RV-6 and a RV-6A both of which won Lindy awards at AirVenture Oshkosh. He received instrument rating in his RV-6. He is a Technical Counselor for his local Chapter and is active in the RV builders group in Eugene, Oregon.

## EAA Legal Advisory Council

The EAA Legal Advisory Council is a group of attorneys who possess expertise in representing airmen in FAA enforcement actions, legal matters pertaining to FAA rulemaking and regulations and other matters pertaining to the field of aviation law. The Legal Advisory Council was organized in 1988, to help provide EAA Headquarters with the best possible information on important regulatory issues that often require their particular expertise.

Those interested in consulting with an EAA Legal Council member should contact EAA Aviation Information Services at 888-322-4636, extension 4821 or [infoserv@eaa.org](mailto:infoserv@eaa.org). Each council member in addition to being a pilot and EAA member is recognized as a highly respected member of the aviation law community in this country.

Harry L. Riggs, Jr., Esq., Chairman  
Edgewood, KY

Pete Axelrod, Esq.  
San Rafael, CA

Patricia J. Arthur, Esq.  
Littleton, CO

James E. Cooling, Esq.  
Kansas City, MO

Alan Farkas, Esq.  
Chicago, IL

Michael J. Pangia, Esq.  
Washington DC

R. Patrick Phillips, Esq.  
Orlando, FL

Michael F. Van Hoomissen, Esq.  
Portland, OR

Arthur Wasserman, Esq.  
Van Nuys, CA



## EAA Ultralight Council

EAA has the benefit of the EAA Ultralight Council, which represents a vast spectrum of ultralight aviation...airpark owners, ultralight flight instructors, dealers, Chapter Presidents and fly-in chairmen. The EAA Ultralight Council is responsible for developing policy and goals for EAA Ultralight programs and activities.

For additional information you can also contact [ultralights@eaa.org](mailto:ultralights@eaa.org).

Carla Larsh (Chairman)  
(765) 412-4415 (Ph)  
[clarsh@tnni.net](mailto:clarsh@tnni.net)

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Ben Morrow  
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[bmorrow@kc.rr.com](mailto:bmorrow@kc.rr.com)

Leo Parent, Jr  
(928) 526-0130 (Ph)

## Section 9

### **SUPPORT FROM HQ**

As an EAA Chapter you have many resources available to your Chapter from the Chapter Office. We have a wealth of services and information available to your Chapter in order to help your Chapter promote events, recruit new members and accomplish routine activities.

This section contains the following information:

#### **Section 9 – Table of Contents**

##### Section 9.1 Promotional Support

- Lists & Labels
- Calendar of Events
- Promotional Materials
- Event Booth Guidelines
- Press Releases

##### Section 9.2 Chapter Survey

##### Section 9.3 Young Eagles

- EAA Young Eagle Pilot Guidelines
- Young Eagle Flight Rally Planner

## **Promotional Support**

Chapters have two primary reasons to engage in promotional efforts for the Chapter. The first is for membership recruitment purposes and the second is for publicizing an upcoming event or activity. In order to help your Chapter in these efforts there are several tools and services available to your Chapter.

### **Lists or Labels**

Many Chapters are looking to recruit new members or extend an invitation to fellow EAA members to attend an upcoming event. A great place to start is by inviting other EAA members in the area to come out, attend a meeting or join the Chapter. The EAA Member and Chapter Relations Office will be happy to send your Chapter a list of members in your area by zip code for these purposes.

**To request a list send the following information to [chapters@eaa.org](mailto:chapters@eaa.org):**

- 5-Digit Zip Code to base the search from
- Number of miles radius from the zip code to go out in the search (example: 20 miles)
- Maximum number of pieces your Chapter is prepared to mail

Please note that the information that is provided will be sent in an Excel file. If you Chapter is unable to work with an electronic file we can send the information in the form of address labels. We are not able to provide e-mail addresses (as per the request of members to not share this information).

It is also very important that the above information is utilized for Chapter purposes only. Our office receives numerous requests for the above information in order to promote an individual's business or a non-EAA Chapter event. It is very important that the information is only utilized for Chapter purposes. In order to respect the privacy of our members, the information should not be used for commercial or individual use.

### **Calendar of Events**

Increasing the attendance at your fly-ins and activities is a goal of many Chapters. To help in this effort there is a Calendar of Events posting on the EAA web site that Chapters can take advantage of. It allows your Chapter to get all of the vital information out to those looking for activities to take part in. Information is posted on what event it is, where it will be conducted, when it will take place, contact information for further information, etc.

To submit an event for posting on the web site, simply go to the Calendar of Events area of the web and complete the on-line form:

<http://www.eaa.org/events/events.asp>

Be sure to have your Event Notice Form submitted for the insurance as well. They are required a minimum of 30 days prior to the event or a minimum of 2 weeks prior for strictly Young Eagle events. The event forms can be found on the web as well at:

<http://www.eaa.org/chapters/admin/insurance.asp>

## **Promotional Materials for EAA Chapters**

The following promotional materials are available for your Chapter to assist in your recruitment efforts. Please complete the form below and check off (✓) the items your Chapter is interested in receiving. **We will send your Chapter the appropriate quantities of supplies based on the type of event and estimated attendance.** Please submit promotional material requests a minimum of 3 weeks prior to the event.

Date of Event: \_\_\_\_\_

Chapter Type: EAA IAC UL VIN WAR Chapter/Squadron #: \_\_\_\_\_

Name: \_\_\_\_\_ EAA #: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Name of Event: \_\_\_\_\_

Estimated Attendance: \_\_\_\_\_

### **BROCHURES**

- \_\_\_\_\_ EAA Membership Applications (Chapter Rebate Form)
- \_\_\_\_\_ EAA Membership Applications (Non-Rebate Form)
- \_\_\_\_\_ Lucky Lease EAA Membership Brochure
- \_\_\_\_\_ What is EAA Brochure
- \_\_\_\_\_ Chapter Brochure
- \_\_\_\_\_ Young Eagles Brochure
- \_\_\_\_\_ Warbird Brochure
- \_\_\_\_\_ Vintage Aircraft Brochure
- \_\_\_\_\_ Sport Pilot Source Guide

### **MAGAZINES**

- \_\_\_\_\_ Sport Aviation
- \_\_\_\_\_ Sport Pilot
- \_\_\_\_\_ Sport Aerobatics
- \_\_\_\_\_ Warbirds
- \_\_\_\_\_ Vintage Airplane

### **OTHER**

- \_\_\_\_\_ Walk Me Signs (\$.50 each)\*
- \_\_\_\_\_ Judging Standards Manual
- \_\_\_\_\_ Chapters Put the Fun in Flying Banner (\$20 each)\*
- \_\_\_\_\_ EAA Chapter Event Booth Guidelines
- \_\_\_\_\_ Giveaway Items

\* Walk Me Signs are available to Chapters at a charge of \$.50 each. "We Put the Fun in Flying" EAA Chapter Banners are available for \$20. **Please include a check, made payable to EAA, with your order form for these items and sent to: EAA Chapter Office, PO Box 3086, Oshkosh, WI 54903-3086.**

If paying by credit card please complete the following:

Cardholders Name:

\_\_\_\_\_

Type of Credit Card: (Please circle one.)

Mastercard Visa American Express Discover

Credit Card Number:

\_\_\_\_\_

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

Cardholder's Signature:

\_\_\_\_\_

**Orders may be faxed to: 920-426-6560**

## **EAA Chapter Event Booth Guidelines**

Here's some quick "How To" Guidelines for setting up an informational booth:

### **Goals of an EAA Information Booth**

Recruit new EAA members \* Recruit new EAA Chapter members \* Provide information about EAA and your Chapter (examples: our Chapter regularly flies Young Eagles, our Chapter has an upcoming fly-in...EAA hosts the world's largest fly-in, EAA members have flown over 1 million children through the EAA Young Eagles program, etc...) \* Possibly use the booth as a Chapter fundraising opportunity

### **Display Ideas**

- Try to place your booth in a high traffic area so the display is exposed to the most amount of people for most of the day. Also, make sure that your banner is clearly visible and that your booth is very accessible. At an outdoor event it is usually better to have your booth outside rather than indoors. Some ideas for locations:
  - Near an entrance gate
  - Near a food line
  - Near a popular aircraft display
- If possible, park an aircraft (or aircraft project) near the booth. This can be a great way to draw people to the booth and engage them in conversation.
- If your booth is located in a tent, try to place your banner on the top of the tent frame.
- If you are going to have other activities going on within your booth (signing up Young Eagles, holding a raffle, etc.), then have a separate area of the booth (maybe a separate table) to handle these operations so that the introduction to EAA and to your Chapter are not lost in the shuffle.
- If possible, have a promotional piece (brochure, flyer) about your Chapter that includes the following:
  - Chapter meeting info.
  - Chapter contact info.
  - Chapter event info.
  - Chapter purpose (or mission statement)
  - Chapter website
  - Membership Info (Chapter membership application if possible)
- If possible, have your Chapter newsletters on display
- Always keep your display area as clean and neat looking as possible. An unkempt display gives an unprofessional appearance.



## Personnel

- Always have the booth manned during the regular fly-in hours of operation. Never leave the booth unattended for extended periods of time.
- Always wear a nametag when manning the booth. Wear a Chapter or EAA shirt if you have one.
- Some ideas for introductions to the potential new member:
  - “Hi, where are you from....did you know there is a really great Chapter near you...”
  - “Hi, are your children interested in taking a free airplane ride?”
  - “Hi, are you already an EAA member? If yes, would you like to join our Chapter?”
  - “Hi, have you ever thought of joining EAA?”
  - “Hi, have you ever been to AirVenture before?”
  - If someone is looking at one of the publications – “This magazine is what EAA members get eat month...it is just one of the great membership benefits.”
- Always be ready to provide the interested member with a list of membership benefits (all volunteers that will be staffing the booth should review EAA promotional materials before the event)
- When someone does join/renew, provide them with:
  - Copy of the membership application as a receipt of their payment (this is easily done with the pink carbonless copy.
  - Always provide them with a copy of the magazine they chose (and any other magazine for that matter).
  - Remind the new members (and rejoins) that if they ever have any questions that they can always access EAA staff by using the directory on the inside cover of their magazine.

## Membership Dues

- Ensure that the EAA membership dues are kept separate from any dues that your Chapter would be collecting. It is always best to keep the dues with the corresponding membership application.  
**TIP: Have one volunteer in control of the money.**
- All checks for EAA memberships should be made out directly to “EAA.” Be sure to clearly mark your Chapter on each application. Once the event is over, please send all EAA membership dues and corresponding EAA Membership Applications to:

EAA Chapter Office  
PO Box 3086  
Oshkosh, WI 54903-3086

## Safety

- All tent stakes should be clearly marked and firmly staked.
- All sign frames, A-frames, and banner frames should be firmly secured.

## Magazines

- Closely monitor your supply of EAA magazines. You don't want to run out (especially of Sport Aviation or Sport Pilot), but you also don't want to have a large supply left over after the event.  
**TIP: Only display a small supply of magazines at any given time, and talk to people about what a great membership benefit the magazines are.**

## **Press Releases**

When promoting your Chapter events your Chapter may wish to advise the local media about your planned activities. This can be done with a simple press release. Don't let this intimidate you. All a press release does is to contain the basic information about the event and contact information if people, or the press, would like additional information or to cover the event.

All you need to do is answer five basic questions: Who, What, When, Where and Why? Start out with the most important information and keep it direct and to the point while still providing enough to hopefully spark the media's interest in attending the event, finding out more about your Chapter and sharing it with the public. Stick with the basic information and keep it concise and to the point.

Remember, they receive many press releases in the course of a week and your goal is to make yours easy to read and provide the necessary detail for them to quickly understand the main topic of your release. Providing your contact information is essential should they wish to follow up with your Chapter for additional detail. Print your release double-spaced on a single sheet of paper and use Chapter letterhead if you have it.

A sample press release form follows:

SAMPLE



## FOR IMMEDIATE RELEASE

### FLY-IN PLANNED AT ABC AIRPORT

For more information:

Chapter Representative \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

E-Mail \_\_\_\_\_

Airport, City, State – Date of Release – This opening paragraph should give a *brief* description of the most important information in approximately 25 words or less. It should be sure to contain enough information to stand on its own and also compel the reader to finish reading the rest of the press release.

The next paragraph should contain the basics of Who, What, When, Where and Why? Give them specifics and make sure to provide enough detail so that all of the essentials are covered. Be precise and include a few details to peak the interest of the media you are sending the release to. Although you are provide a quick summary remember you are trying to capture their interest and don't want to leave out any important features, crucial details or local points of interest.

The balance of the release will provide additional detail and any unique or especially interesting details.

The total release should be approximately 300 to 800 words depending on the topic of the release. Most Chapter fly-ins or events can easily be accomplished in a press release with around 500 +/- a few words. Remember, they can call you for additional information if they wish to do a story.

The final paragraph should summarize the key points, location information and provide for contact information should additional detail be required. Always be sure to include a way for people to contact your Chapter to answer any questions that they have and a web link where appropriate.

Contact:

John Q. Public, President  
EAA Chapter 12345  
555-555-5555  
<http://www.xxx.com>



# GENERIC EAA CHAPTER SURVEY

Name \_\_\_\_\_ EAA # \_\_\_\_\_  
 Address \_\_\_\_\_ Expires \_\_\_\_\_ Year Joined \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Member of the following division(s) ?  
 email \_\_\_\_\_ Vintage Aircraft Assn.  yes  no  
 Home Phone ( ) \_\_\_\_\_ Warbirds of America  yes  no  
 Internat'l Aerobatic Club  yes  no

Occupation \_\_\_\_\_ Employer \_\_\_\_\_  
 Work Phone ( ) \_\_\_\_\_ Work email \_\_\_\_\_

Spouse's name \_\_\_\_\_  
 Child \_\_\_\_\_ Age \_\_\_\_\_ Child \_\_\_\_\_ Age \_\_\_\_\_  
 Child \_\_\_\_\_ Age \_\_\_\_\_ Child \_\_\_\_\_ Age \_\_\_\_\_

### Chapter Leadership Positions Held

Position	Date (from-to)	Chapter #	Position	Date (from-to)	Chapter #
President	_____	_____	Vice President	_____	_____
Secretary	_____	_____	Treasurer	_____	_____
Chapter Director	_____	_____	Tech Counselor	_____	_____
Flight Advisor	_____	_____	Newsletter Editor	_____	_____
Young Eagle Coor.	_____	_____	Facilities Manager	_____	_____
Young Eagle Admin.	_____	_____	Flying Start Coord.	_____	_____
Membership Chr.	_____	_____	Librarian	_____	_____
Publicity Chairman	_____	_____	Events Chair.	_____	_____
Hospitality Chrmn.	_____	_____	Flying Start Coord.	_____	_____

Pilot Certificate and Ratings \_\_\_\_\_ FAA "Wings" Participant ?  
 Medical Class \_\_\_\_\_ Date \_\_\_\_\_ Last BFR Date \_\_\_\_\_  yes level \_\_\_\_\_  no  
 Mechanic Certificate(s) Held  Airframe  Powerplant  Inspection Authorization

### Aircraft Currently Owned

Year	Make	Model	Powerplant	Is it a project?
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

List any others here \_\_\_\_\_  
 \_\_\_\_\_

### Aircraft Under Consideration

Year	Make	Model	Powerplant	Is it a project?
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no
_____	_____	_____	_____	<input type="checkbox"/> yes <input type="checkbox"/> no

# Meeting Your Interests

In order for us to provide our members with meeting programs that are of benefit and interest we must know where your interests lie. Please rate the following program categories on a 0-5 scale with 0 being of no interest, 5 being of high interest. Do not rank them in order of preference.

If you are skilled or have extensive knowledge with regard to any of these program categories, please indicate so with 1-5 scale. With 1 being somewhat knowledgeable and 5 being very knowledgeable. Please indicate if you can help with any of these programs.

Interest Rating	Skill Rating	Can Help	
_____	_____	_____	Technical Information (Custom-Built, Builder Reports)
_____	_____	_____	Technical Information (Restorations, Restorer Reports)
_____	_____	_____	Technical Skill Workshops (Hands-On)
_____	_____	_____	Welding
_____	_____	_____	Composites
_____	_____	_____	Painting and Preparation
_____	_____	_____	Powerplant
_____	_____	_____	Care and feeding
_____	_____	_____	Overhaul
_____	_____	_____	Sheetmetal
_____	_____	_____	Layout and bending
_____	_____	_____	Riveting techniques
_____	_____	_____	Fabric Covering
_____	_____	_____	Woodwork
_____	_____	_____	Tool techniques
_____	_____	_____	Propellers
_____	_____	_____	Care and feeding
_____	_____	_____	Balancing
_____	_____	_____	Hydraulic Systems
_____	_____	_____	Fuel Systems
_____	_____	_____	Weight and Balance Clinic
_____	_____	_____	Commercial (Product manufacturers)
_____	_____	_____	Pilotage
_____	_____	_____	VFR Ground School / Refresher
_____	_____	_____	IFR Ground School / Refresher
_____	_____	_____	Navigation (GPS)
_____	_____	_____	Safety Programs (“FAA Wings”)
_____	_____	_____	Project Visits
_____	_____	_____	Field Trips (ATC Center/ Tower/Tracon/Museums)
_____	_____	_____	Aviation History
_____	_____	_____	Photography and Video
_____	_____	_____	Aviation Records and Racing
_____	_____	_____	Aerobatics
_____	_____	_____	EAA and EAA Foundation Programs
_____	_____	_____	Gray / Bald Eagle Flights
_____	_____	_____	Travels by Personal Aircraft

Please write your specific program ideas: \_\_\_\_\_

## Personal Aviation and Chapter Interests

When and how did you become interested in aviation? \_\_\_\_\_

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What expectations do you have of this Chapter ?

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What improvements would you like to see within this Chapter ? \_\_\_\_\_

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What do you enjoy the most about your affiliation with this Chapter ? \_\_\_\_\_

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What do you enjoy the least about this Chapter ? \_\_\_\_\_

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Please give us your candid comments about the following Chapter Leadership topics.

Corporate structure (Directors, Officers and Committees) \_\_\_\_\_

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Leaders themselves. \_\_\_\_\_

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Direction of Chapter \_\_\_\_\_

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Overall, how would you rank this Chapter with others you are or have been a member of ?  
 Much better    Better    Same    Worse    Much worse    No other Chapter

What is your overall satisfaction rating with regard to how well this Chapter is meeting your expectations and interests ?

Excellent    Very good    Good    Bad    Very bad

## Volunteer Information

Check the positions in which you hold an interest in filling.

### Elected Positions

- President
- Vice President
- Secretary
- Treasurer
- Director

### Appointed Positions

- Newsletter Editor
- Young Eagle Coordinator
- Young Eagle Administrator
- Librarian
- Facilities Manager
- Events Chairman
- Hospitality Chairman
- Programs
- Flying Start Coordinator
- Membership Chairman
- Webmaster
- Publicity Chairman
- Government Affairs
- Historian
- Merchandise Chairman
- Photographer
- Fly-Out Chairman
- \_\_\_\_\_

Check the events in which you would like to volunteer your services.

- Hangar Dance
- Fly-In
- EAA Tours (B-17, Spirit of St. Louis)
- Regional Fly-In
- Barnstorming Young Eagle Rally
- Local Work Party Weekends
- Chapter Picnic
- Oshkosh Work Party Weekends
- Local Young Eagle Rallys
- Fly-Outs
- AirVenture Oshkosh
- Awards Banquet
- Builder's Workshops
- \_\_\_\_\_

If you have specific tools or skills that you would be willing to share with your fellow members, please list them here. \_\_\_\_\_

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If there are any special tools or skills of which you are in need for your project, please list them here.

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Please include any additional comments or questions you may have. \_\_\_\_\_

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**Thank you for completing this survey.**

## Young Eagles

This section of the Chapter Handbook will highlight some key information for the Young Eagles Program including Pilot Guidelines and a Flight Rally Planner. Please note that the Young Eagles web site includes volumes of additional information and can be found at [www.young eagles.org](http://www.young eagles.org).

### EAA Young Eagle Pilot Guidelines

The EAA Young Eagles program was launched in 1992. Since then more than 40,000 pilots have been active participants flying more than 1.2 million young people from more than 90 different countries.

The Young Eagle Pilot requirements are basic, but must be followed.

- All participating pilots must hold an Appropriate Airmen's Certificate (Sport Pilot or greater)
- Pilots must possess a current Medical Certificate (if applicable)
- Pilots must be current EAA National Members
- Pilots must be current to carry passengers in the aircraft they plan to use.
- Pilots must have a current Flight Review
- Aircraft Passenger Liability Insurance is required for the aircraft used (owned, rental or borrowed)
- The Young Eagles registration form must be completed before the flight complete with parent or guardian signature.
- The aircraft used for the flight must be in airworthy condition.

As an EAA member, pilots participating in the Young Eagles program are eligible for an additional \$1 million of passenger liability insurance coverage, if they carry a minimum of \$100,000 per seat liability insurance.

Other Young Eagle volunteers (ground support) are not required to be EAA members, but are encouraged to join EAA.

### **Guidelines for Conducting a Young Eagles Flight**

#### **Before the Flight**

Read all the guidelines carefully. In addition to a memorable flight experience, Young Eagles will also remember their pilot. If appropriate, provide your name and telephone number to the Young Eagle for any questions their parents or guardians may have.

Each Young Eagle should already have a registration form. This includes important pre-flight information. Photocopies are acceptable. In addition, you will need a Young Eagles Certificate. Contact the Young Eagles Office to obtain certificates and registration forms. Prior to the flight, you must receive a signed registration form from the legal guardian of the participant.

Discuss what you will do and see on your flight. Stress ramp safety, emphasizing caution around propellers and moving aircraft. Conduct a pre-flight inspection accompanied by your

Young Eagle. Help them into their seat. Buckle their seat belt and shoulder harness. Explain the operation of the aircraft door. Describe the interior of the airplane. Allow time to answer any questions they may have before you start your engine.

### **During the Flight**

The experience you provide your Young Eagle will be cherished for a lifetime. Someday, these Young Eagles may share a flight experience with another generation of aviation enthusiasts.

Maintain a common-sense approach to the flight. You may take more than one young person at a time, but consider the experience from the participant's perspective. A flight in a commercial airliner, for instance, would not suit the intent of this program. Allow the participant's parent(s) to observe or take part as circumstances allow, but remember the child is the focus of the event.

Plan your flight to be as smooth as possible. VFR weather is required. You may let the Young Eagle follow through on the controls, but you must be in command of the aircraft at all times. No aerobatic maneuvers, unusual attitudes or formation flights are permitted in the Young Eagles Program. However, you may want to demonstrate how the airplane is controlled through demonstrations of simple climbs, turns and descents. Apply see-and-avoid techniques at all times.

### **After the Flight**

Congratulate your new Young Eagle! Share the excitement and encourage questions. Take as much time as possible with your Young Eagle. They have just completed an experience they will long remember.

Reward the young person with a Young Eagles Certificate and any other recognition you care to add. Remind the Young Eagle that their name will be entered in the "World's Largest Logbook" located in the EAA AirVenture Museum in Oshkosh and on the Internet at [www.young eagles.org](http://www.young eagles.org). **BE SURE YOU SEND IN THE REGISTRATION FORM**, so this can be accomplished. **Don't delay!** A misplaced or lost Registration Record will mean the Young Eagles will not be officially registered for this program or receive subsequent benefits.

Consider having a camera available for pictures. Share your post-flight rituals – replacing maps, straightening the cockpit and pushing the aircraft into the hangar.

Once the registration form is recorded at the Young Eagles office, they will receive an invitation to visit the Young Eagles web site. You can encourage a Young Eagle's interest in aviation with an invitation to an EAA Chapter meeting, an introduction to a flight instructor or simply an invitation for another flight.

Finally, take pride in what you have done. The Young Eagles Office will officially record your mission information taken from the registration form. Pilots earn recognition as their mission count grows. Remember, it's not too soon to begin arrangements for your next Young Eagle flight.

### **Frequently Asked Questions About Young Eagles**

**Do I have to belong to an EAA Chapter to participate?** No. Any current EAA member may participate.

**Is the Young Eagles Program only for a young person's FIRST ride?** No. The intent of the Young Eagles demonstration ride is to motivate young people and provide a memorable flying experience. In many cases, however, it is the child's first flight experience.

**Can an EAA member from another country participate in the Young Eagles Program?**

Absolutely. There have been Young Eagles flown in more than 90 countries – including Canada, Scotland, Germany, England, Greece, France, Finland, Malaysia, Mexico, New Zealand, Spain and Taiwan.

**Can I fly in my licensed "Experimental" aircraft?** Yes. All aircraft are eligible provided they are properly licensed and flown in accordance with appropriate FARs (or the country's equivalent) and conform to Young Eagles Program guidelines.

**I'm not a pilot. How can I participate?** Volunteers are needed to assist in finding young people, flightline safety, registration and coordinating pre- and post-flight activities. Volunteers are also needed to serve as local EAA Chapter Coordinators. There are many opportunities to help young people experience aviation. Many Young Eagle events are scheduled around the world each week and your assistance is always welcome.

**Can I deduct expenses incurred while flying Young Eagles?** Yes. The IRS has ruled that volunteer Young Eagle Pilots can deduct direct, out-of-pocket expenses incurred in direct connection with and solely attributed to the Program. If these conditions are met, volunteers are deduct direct out-of-pocket expenses such as (1) fuel and oil directly consumed by the aircraft in the demonstration flight, not to exceed 200 miles; (2) fuel and oil to another airport within 50 miles to meet a young person; (3) transportation, not to exceed 30 miles one way, to and from the airport; (4) the rental charge for a bus or van to bring a group of young people to the airport; (5) the rental expense of an airplane used only for the Program; (6) postage for mailing registration records to the Young Eagles Office; (7) extra liability insurance purchased solely for flights for the program; (8) landing and tiedown fees at a non-home-based airport; (9) aeronautical education materials; (10) meals for the young person (but not the volunteer); and (11) film and development of pictures for the young person. Indirect expenses, such as hangar fees and annuals, are not considered deductible. Please maintain reliable records (receipts or a contemporaneous diary) of the out-of-pocket expenses. For the purposes of computing the expense of transporting the volunteer and/or young person to and from the airport in a passenger automobile, a standard mileage rate can be used instead of operating expenses. Please consult a tax professional with any specific questions related to your finances.

**I've heard about Young Eagles Flight Rallies. What are they?** A Flight Rally is a group flying session. These events usually involve an EAA Chapter that wishes to fly a number of young people. Additional "hands-on" activities are common at these events. Volunteers are always needed to assist at a Flight Rally.

**What is a Young Eagles pilot ID number and how can I use it?** Pilot ID numbers are assigned to each pilot *after* they register their first Eagle Flight. A Pilot ID can save time when filling out registration forms. The form is considered complete if the Pilot ID number, date of flight and type of aircraft are indicated on the Pilot Information section of the registration form. It is not necessary to obtain a Pilot ID number before flying your first Eagle Flight. A letter from the Young Eagles Office will be sent directly to you after your first Young Eagles flight indicating your pilot ID number. Pilot ID numbers are listed on each issue of Eagle Flight Leader News. Your Pilot ID number is the last six digits on the top line of the mailing label.

**What if the child does not meet the age criteria?** The program guidelines state that children should be between the ages of eight and 18. We also understand that there are some times extenuating circumstances when younger children may benefit from the Young Eagles experience. You should carefully assess the individual child and their ability to learn from the experience. We will enroll children younger than the minimum age criteria (but not younger than five years old). We will not log children after their 18<sup>th</sup> birthday. In all cases, consideration must be given to the maturity and physical size to ensure safety and maximum benefit from the demonstration flight. Registrations from children who are outside the age guidelines will be returned to the pilot for clarification.

**Who can I contact for suggestions or support?** For general questions about Young Eagles, please contact the EAA Young Eagles Office. Phone: 877-806-8902. FAX: 920-426-6865. E-Mail: [yeagles@eaa.org](mailto:yeagles@eaa.org). Additional background information and activity suggestions are available on the Young Eagles web site, [www.youngeagles.org](http://www.youngeagles.org). Locally, the Young Eagles Office can provide you with a list key Young Eagle Leaders in your area. Contact the office for details.



## Young Eagle Flight Rally Planner

One of the reasons for the Young Eagles program success has been the simplicity of the concept – a pilot and child go flying. While our ultimate experience is for a child to have a one-on-one experience with the pilot, that is not always necessary or possible. By the same token, it is sometimes advantageous to schedule a group event or Flight Rally. These events have been a very popular aspect of the program for a number of reasons. In a rally situation, there is usually ample ground support to handle paperwork and safety; it is sometimes easier to handle groups of children, such as from a youth group or school; and there is a social aspect of participating with others in a flight day.

By reading through the following guidelines, you will find ways to incorporate both the one-on-one experiences available through the program with a Flight Rally. Please remember, the ideas and guidelines contained in this document are just that – ideas. Please feel free to adapt these ideas to your local airport. If at any time, you have questions or concerns about the Young Eagles Program, please contact our office toll free at 877-806-8902. We are here to assist you in any way we can. We look forward to hearing from you.

There are many definitions of Flight Rallies, or group flying events. A Flight Rally can involve fewer than 10 children or in excess of several hundred. The size of the event is not what matters; it is the quality and safety of the event – that always comes first. We suggest that you start with a small first time effort to develop procedures that work best for your area.

The following list will give you suggestions for a successful Young Eagles Rally. Remember they are only suggestions and you may need to make changes to better fit the needs of your area.

### **Steps to a Successful Young Eagles Flight Rally**

#### **Determine the level of support available to your Chapter.**

Take a survey of current members and determine how many would be available to participate and how often they would like to fly. The following requirements are necessary for **ALL** pilots who wish to participate in the Young Eagles Program:

**Current National EAA Member  
Airman's Certificate (Sport Pilot or higher)  
Current Biennial Flight Review  
Current Medical Certificate (If applicable)  
Currency in the Aircraft Used  
Aircraft Liability Insurance**

Each pilot must have aircraft passenger seat liability insurance. For those EAA member who choose to insure at a level of \$100,000 per passenger seat, EAA will automatically provide an additional \$1,000,000 liability umbrella policy. This coverage is only in effect while participating in Young Eagle Flights. Pilots who choose to insure at lower levels may still participate, however the additional insurance will not apply. Some confusion has surfaced because of EAA's supplemental \$1 million blanket liability policy. Simply stated, if a pilot carries liability insurance they can participate in the Young Eagles Program. If a pilot has \$100,000 per seat or more in coverage, EAA has an additional \$1 million blanket policy that will supplement their insurance.

### **Recruit others to assist you:**

There are many areas that can be delegated to other volunteers. Consider having one person in charge of each area of responsibility such as:

## **PUBLIC RELATIONS**

### **Responsibilities:**

**Keep Airport Management informed** by contacting your airport manager, FBO representatives and air traffic control personnel during the early stages of your planning. Involving them in the process early will make logistics easier in the long run.

**Select an appropriate date** taking into consideration any other major events in the area involving children. Discuss and plan if and how you will pre-register children or use a first come, first served method. In either case, keep a maximum number of children in mind based on the available aircraft volunteers and airport capacity. You may wish to set up an answering machine to take names and then schedule times for the flights.

**File a Chapter/Squadron Young Eagles Rally Notice Form at least two weeks prior** to the event for General Liability Insurance to protect your Chapter, officers, directors, members and volunteers. The Rally Notice Form can be found on the EAA website in the Chapters section and also on the Young Eagles Web site under Resources. This should be filed with EAA Headquarters at least two weeks prior to the event. A copy is also provided in the Young Eagles Chapter Coordinator folder.

**Order supplies early.** Contact the Young Eagles office and place your order for Young Eagle brochures, which you can use as a PR tool prior to the event, Registration forms for the young people actually participating in the flights and Certificates to present following the flight. Two weeks prior to the event is sufficient to ensure the on time delivery.

**Publicity.** A sample News Release is provided in the Coordinator folder or through the Young Eagles Office. Use the News Release as the basis for your publicity. You may create posters to promote your event to the general public. Many times radio or TV stations have provided announcements free of charge. A sample new release is also available on the Resources page.

## **GROUND OPERATIONS**

### **Responsibilities:**

**Safety first:** No child or parent should be allowed in the aircraft movement area without an escort. Remember that the general public is not familiar with airplanes, how they move and spinning propellers. **No matter how you set up the operations, HOT LOADING IS NOT ALLOWED under the Young Eagles Program at any time, under any circumstances.**

**Registration.** This operation should be located so that ALL who enter cannot enter without passing this location. Each young person intending to fly must have the form properly filled out with the parent/guardian signature. Sometimes a number is assigned to be called out when the flying starts. The same number should be written on the Registration form. After registration the prospective Young Eagle should report to Ground School.

**Ground School.** Ground school will cover the operation of the aircraft and the airport. A detailed account of the flight will be given. This can be as detailed as you have time and the facility for. Some Chapters may show a video. They will be called directly from this area for their flight or sent to a holding area until the pilots are ready. Having a clipboard and folder for each pilot with preprinted labels simplifies paperwork and keeps the Young Eagles with the right pilot. The pilot will personally escort the young person to the aircraft. The pilot is responsible for loading and unloading all passengers. After the flight the pilot will escort the young person to the Certificate location.

**Certificates.** Pilots will bring the young people to this operation AFTER the flight has been completed. The pilot will personally sign the certificate and present to the new Young Eagle. The same clipboard and folder from Registration will be sent to this area to have the Certificates printed. The pilot can find his/her clipboard with the Certificates on top ready to be signed. When the pilot is ready to go flying again, they return the clipboard to the person handling the flights. Russ Erb from EAA Chapter 1000/49 has created a Windows-based Certificate Printing Program that will develop a database that can be crosschecked after the event between the pilots and their flights. You can download it from the Resources page of the Web site (<http://www.young eagles.org/volunteers/resources/>) or obtain a disk from the Young Eagles Office.

## **FLIGHT OPERATIONS**

### **Responsibilities:**

**Pilots:** All pilots should check in and if they have not been previously cleared, be prepared to show proper credentials to conduct Young Eagles flights. They should check the pilot information that is on file and make sure it is accurate. If they have not flown with you before, make sure you have them complete a pilot information sheet. Plan to provide water and refreshments for the pilots and volunteers. It is also important for all volunteers to take a break from the action.

**Pilot Briefing:** All pilots will be required to attend the pilot briefing prior to conducting any Young Eagles flights. It is also a good idea to have ground support volunteers attend the briefing as well. The coordinator, a designated pilot or even a local ATC representative can provide the briefing. A sample briefing should include the following topics:

**Welcome**  
**Review of Pilot Requirements**  
**Weather**  
**Who will be flying**  
**Ground flow for paperwork**  
**Ground flow for aircraft (Taxi routes)**  
**Flying route (if one is established)**  
**Altitudes and airspeeds**  
**NOTAMS**  
**Ramp Safety**  
**Flight Safety**  
**Questions**

## **POST EVENT**

At the conclusion of the event the Young Eagles Coordinator will collect all of the completed registration forms and send them as soon as possible to the Young Eagles Office. ***It is important to the pilots and to the new Young Eagles that the paperwork is sent to the Young Eagles Office to be recorded as soon as possible after the flight.*** Please clip each pilot's Young Eagles together and again make sure the information is accurate, legible and the children are the correct age to be recorded as a Young Eagle.

There should be a debriefing period following the event with pilots and volunteers to find out what worked and what didn't. Make notes of changes needed to improve for the next time. Thank you notes to the airport manager, FBO or host tower site are always appreciated and make good connections for another event. Most of all the pilots and volunteers should feel appreciated as well.

If you have any questions or concerns call us. We are here to help you have a successful Young Eagles event. We look forward to hearing from you and don't forget to send a report and pictures.