



**International Society of Automation**  
*Setting the Standard for Automation™*

(/appform/section-annual-report)

## INTRODUCTORY QUESTIONS

**Section Name: \***

**As we consider the process by which a member selects a section affiliation, we find it best for the section name to be the name of the city in which the section typically meets. Would the section like to discuss further with the District Vice President and staff about the name of the section? \***

- Yes  
 No

**When was the section chartered?**

**Please provide your first (given) name and last (family) name. \***

**What is your section role/position title? \***

- President  
 President-elect  
 Secretary  
 Treasurer  
 Membership Chair  
 Program Chair  
 Other

## OPERATIONS

**How often does the section's board meet? \***

- Monthly  
 Quarterly  
 As necessary/no regular occurrence

**How does the section's board meet? (select all that apply) \***

- In-person
- Conference Call/Video
- Other

**What month does the section begin operations for the year? \***

**What month does the section end operations for the year? \***

## FINANCIALS

**What month does the section begin its financial year? \***

**What month does the section end its financial year? \***

Please report the section's financials based on the last financial year.

- Enter all fields in USD
- Include numbers only

### START OF REPORTING YEAR BALANCE FOR TOTAL RESOURCES

**What was the section's bank account balance at the start of the last financial year? \***

**What was the section's balance of all other investment accounts at the start of the last financial year? \***

**Start of Calendar Year Total Resources: (Number will calculate automatically)**

### END OF REPORTING YEAR BALANCE FOR TOTAL RESOURCES

**What was the section's bank account balance on the last day of the financial year? \***

**What was the section's balance of all other investment accounts on the last day of the financial year? \***

**End of Financial Year Total Resources Calculation: (Number will calculate automatically)**

**What was the section's income budget for the last financial year? \***

\$	<input type="text"/>
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**What were the section's sources of actual income earned during the reporting year? (Enter 0 if no income was earned)**

**Rebates: \***

\$	<input type="text"/>
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**Sponsors: \***

\$	<input type="text"/>
----	----------------------

**Event/Meeting Registrations: \***

\$	<input type="text"/>
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Amount of income earned through event or meeting registration.

**Fundraising: \***

\$	<input type="text"/>
----	----------------------

**Interest and dividends: \***

\$	<input type="text"/>
----	----------------------

**Other: \***

\$	<input type="text"/>
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**Total Income Calculation: (Number will calculate automatically)**

**What was the section's budget of expenses for the last financial year? \***

\$	<input type="text"/>
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**What were the section's sources of actual expenses during the reporting year? (Enter 0 if no expenses were accrued)**

**Meeting and social activities: \***

\$	<input type="text"/>
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**Scholarships: \***

\$	<input type="text"/>
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**Print newsletter: \*****Administration costs (bank fees, taxes): \*****Section Leader travel (ALC, DLC): \*****Other: \*****Total Expenses Calculation: (Number will calculate automatically)****Total Operating Calculation (Income - Expenses): (Number will calculate automatically)**

## SECTION TAX EXEMPTION

*Sections in the United States have the option to under the ISA group tax exemption.*

**Is the section based in the United States? \***

- Yes  
 No

**Does the section want to be added to or continue under the ISA group tax-exemption? \***

- Yes  
 No

**What is the section's tax ID number (EIN)? \***

*The IRS requires a contact person (this is usually the section's treasurer).*

**First (Given) and Last (Family) Name: \*****Section Address: \***

City \*

State \*

Zip Code \*

## INDUSTRY

Select the industries in the section's geographic area. (select all that apply) \*

- Aerospace
- Automotive
- Chemical
- Engineering and Construction
- Food and Beverage
- Instrumentation, Measurement, and Analysis
- Metals and Mining
- Oil and Gas
- Pharmaceuticals
- Pulp and Paper
- Systems Integration
- Transportation
- Utilities

Have any of the following changes occurred with industry employers in the geographic area? (select all that apply) \*

- Industry employer(s) moved into the area
- Industry employer(s) moved out of the area
- Industry employer(s) reduced staff
- No changes have occurred

## GOALS

Please describe the section initiatives for the past year that relate to ISA's strategic direction (<https://www.isa.org/visionmissionvalues/>).

- **Industry Reach & Awareness** - Establish *relevance* and credibility as the *home of automation* by anticipating *market needs* and *collaborating* to develop *independent technical content*.

- **Membership Development & Engagement** - Enhance *member value* and expand *engagement* opportunities to nurture and grow a more *diverse* and *global* community to advance the automation profession.
- **Technical Education & Certification** - Become the recognized leader in automation and control *education*, providing training, certification, and publications to *prepare the workforce* to address technology changes and industry challenges in the most *flexible* and *relevant* ways.
- **Leadership & Business Skill Development** - Create *opportunities* for members to improve critical *leadership skills*, to build a *network* of industry professionals, and to develop the *next generation* of automation professionals.

**Industry Reach & Awareness: \***

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**Member Development & Engagement: \***

Word Count: 0 / 500

**Technical Education & Certification: \***

Word Count: 0 / 500

**Leadership & Business Skill Development: \***

Word Count: 0 / 500

**If the section did not consider ISA's strategic direction when setting goals, please explain. \***

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**Describe the section's major accomplishments this past year. \***

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**What are the section's goals for next year? \***

Word Count: 0 / 500

## SUCCESSION PLANNING

Be sure the section submitted a leaders form (<https://www.isa.org/members-corner/leader-resources/administrative-forms/section-leader-form/>) to ISA.

**Does the section use committees to help complete the work of the board? \***

- Yes  
 No

**What committees does the section use? (select all that apply) \***

- Membership  
 Programming  
 Newsletter  
 Student Support  
 Scholarships  
 Community Outreach  
 Social

Other

**Describe how the section identifies and cultivates future leaders. \***

Word Count: 0 / 500

**Describe the section's election process. \***

Word Count: 0 / 500

**Describe how the section transitions and trains new section leaders. \***

## BYLAWS AND OPERATING PROCEDURES

**Please upload the section's most current bylaws. \***

+ Select a file

?

If the section does not have current bylaws, please use the template (<https://www.isa.org/members-corner/leader-resources/operating-documents/section-bylaws-template>) to create and upload new bylaws.

**How often does the section board review the bylaws? \***

▼

## COMMUNICATIONS

**What methods of communication does the section use to communicate with the members? (select all that apply) \***

**This field is required**

- Email
- Phone
- Newsletter
- Website
- Flyers or posters (at offices, at meeting, etc.)
- Social Media

**How often does the section communicate with the members? \***

## MEMBERSHIP

**Does the section have specific plans for recruitment, retention, and welcome? \***

**Does the section work with and/or support/sponsor any ISA student sections? \***

**Does the section have any of the following dedicated programs? (select all that apply) \***

- Young Professionals (35 years old and under)
- Unemployed Members
- Retired Professionals
- Pre-University Students
- University Students
- Other
- None of the Above

## PROGRAMS

**What types of programs did the section organize this year? (select all that apply) \***

- Technical presentations (in-person)
- Webinar/online meeting
- Non-technical/soft skill presentations
- Networking/social events/fundraising (golf tournaments, chili cook-off...)
- Table top/exhibition
- Field trips or plant tours
- ISA training courses
- Training courses (not ISA official)
- Certification review or study groups
- Presentations to university students

- Presentations to pre-university students
- Career guidance events
- Community education/service
- Other
- None of the Above

**Please specify other: \***

**What was the average attendance of the in-person technical presentation(s) held? \***

**What was the average attendance of the webinar/online meeting(s) held? \***

**What was the average attendance of the non-technical/soft skill presentation(s) held? \***

**What was the average attendance of the networking/social/fundraising event(s) held? \***

**What was the average attendance of the table top/exhibition(s) held? \***

**What was the average attendance of the field trip(s) or plant tour(s) held? \***

**What was the average attendance of the ISA training course(s) held? \***

**What was the average attendance of the non-official training course(s) held? \***

**What was the average attendance of the certification review or study group(s) held? \***

**What was the average attendance of the university student presentation(s) held? \***

**What was the average attendance of the pre-university presentation(s) held? \***

**What was the average attendance of the career guidance event(s) held? \***

**What was the average attendance of the community education/service(s) held? \***

**What was the average attendance of the other activities held? \***

**Did the section award any scholarships? \***

- Yes  
 No

**How many scholarships did the section award? \***

**What was the average amount per scholarship awarded? (USD currency) \***

**What was the total amount of scholarships awarded? (USD currency) \***

**Did the section collaborate with any ISA Divisions? \***

- Yes  
 No

**What division(s) did the section collaborate with? (select all that apply) \***

- Analysis Division  
 Automatic Controls and Robotics Division  
 Automation Project Management & Delivery Division  
 Building Automation Systems Division  
 Chemical & Petroleum Industries Division  
 Communications Division  
 Construction & Design Division  
 Education Division  
 Food & Pharmaceutical Industries Division  
 Mining & Metals Industries Division  
 Power Industry Division

- Process Measurement and Control Division
- Pulp & Paper Industry Division
- Safety and Security Division
- Test Measurement Division
- Water & Wastewater Industries Division

**Please describe how the section collaborated with ISA Divisions. \***

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**Did the section collaborate with any other professional organizations? \***

- Yes
- No

**Please provide the names of the other professional organizations and how the section collaborated with them. \***

Word Count: 0 / 500

## TOOLS AND RESOURCES

**In what areas do you feel the section needs support? (select all that apply) \***

- Recruiting new members
- Retaining current members
- Member engagement
- Recruiting volunteers
- Board operations and succession
- Technical program development
- Fundraising and financial management
- Student Support programs
- Community education programs
- Other

No Support Needed

**What ISA tools/services does the section currently use? (select all that apply) \***

- Community/Microsite
- Section Operations Manual
- Membership Roster
- Membership Statistical Report
- Marketing Materials
- Other
- None of the Above

**Do you have any suggestions for how we could improve these tools/services? \***

Word Count: 0 / 500

**What tools/services would you like to see ISA offer in the future? (select all that apply) \***

- Dashboards
- Document library
- Email system
- Event registration tool
- Financial and banking services
- Speaker/Expert directory
- Section-specific member directory
- Volunteer recruiting tool
- Other

**Please specify other: \***

**In regard to the section's relationship to the District Vice President, is there anything you would like to highlight or suggest for potential improvements to the support you receive? \***

**In regard to the section's relationship with ISA staff, is there anything you would like to highlight or suggest for potential improvements to the support you receive? \***

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## TERMS OF AGREEMENT

*I confirm that our section board has reviewed and understands our rights and responsibilities per the Society's bylaws (<https://www.isa.org/members-corner/leader-resources/operating-documents/bylaws-pdf/>), policies (<https://www.isa.org/members-corner/leader-resources/operating-documents/isa-policies-and-operational-guidelines-pog-pdf/>), and procedures (<https://www.isa.org/leader-resources/operating-documents/isa-manual-of-organization-and-procedures-pdf/>).*

**Checkbox: \***

Confirm

*I hereby certify, to the best of our section's knowledge, the information provided in this report is accurate. We agree to have this report or portions of it available to other ISA sections.*

**Checkbox \***

Agreed

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