

## Board Member Orientation

**Thank you** for volunteering as a board member for your RIMS local chapter. To assist you with your new responsibilities, we have included some useful tips and resources for you to review below:

**1. Get to know your new position** - To act most effectively as a Board Member it is important to get to know the responsibilities that are specific to your new role by reviewing the job description for your position. Your chapter may have developed position descriptions that are specific to your chapter. Ask your chapter President if these are available for your review. If your chapter does not have their own descriptions you should read RIMS Chapter Officer Position descriptions at [www.RIMS.org/positiondescriptions](http://www.RIMS.org/positiondescriptions). These descriptions are guidelines and some duties may differ on your local board. Take some time to review your job description with the Chapter President and/or the Board.

**2. RIMS Chapter Handbooks** - RIMS has developed and continues to develop handbooks to help guide Board Members with the specific duties assigned to them. The Chapter Officers Handbook gives a good overview of how to manage a local chapter. RIMS has also made available a Membership Director and Membership Drive Handbook, a RIMS Delegate Handbook, and a Program Planning Handbook. Additional handbooks are being developed to enhance the library of resources. Volunteers and Board members will be notified regarding updates of existing handbooks and newly developed handbooks as needed. To check out RIMS Chapter handbooks go to [www.RIMS.org/handbooks](http://www.RIMS.org/handbooks).

**3. Building a Successful Chapter Workshop (BSC)** - Held in conjunction with RIMS Annual Conference each year, the BSC is a unique opportunity for RIMS Chapter officers to network and learn from each other through interactive exercises and discussions. This event is free to RIMS Chapter Officers and is typically held the Saturday before the Conference begins. During the workshop we will highlight key areas for chapters, including membership, leadership, communication, programming, etc.

**4. Review RIMS Web site** - As a RIMS Chapter Officer, you will wear many different hats throughout your tenure as a Board member. In addition to the duties covered in your position description you may also find yourself doing things that may include: Chapter spokesperson, Membership Development, Web site development, etc. It is important to take some time to become familiar with RIMS overall mission from your new perspective as a Board member. Also, your chapter may have their own mission statement. Ask your chapter President if your group has a local mission statement and become familiar with it. In addition, take some time to look over the RIMS Web site at [www.RIMS.org](http://www.RIMS.org). Pay particular attention to RIMS membership categories, your chapter's Web site, and the chapters' section of the RIMS Web site.

**5. RIMS Chapter Web sites** - Each chapter has the ability to create and maintain their own Web site at no cost to the chapter, by using software available on the RIMS Web site! RIMS Chapter Services Liaison is available for 1 hour phone tutorials (by appointment) to go over the software and most commonly used fea-



tures of the RIMS based Web sites. This is a great opportunity for both new and existing Chapter Webmasters to become comfortable with creating and/or maintaining their sites. For more information contact [chapterservices@rims.org](mailto:chapterservices@rims.org). As an additional resource, RIMS Membership and Chapter Services Committee has created Chapter Web site guidelines that outline what content is required and recommended for your Web site. The guidelines also offer helpful hints on how to better manage your site. To review these guidelines, go to [www.RIMS.org/chapterwebguidelines](http://www.RIMS.org/chapterwebguidelines).

**6. RIMS Chapter Officers E-Group** - Have a question about chapter meeting topics? Membership Development? Strategic Planning? As a chapter officer you have the opportunity to communicate and network with other Board Members from throughout the United States, Canada, Japan, and Mexico using the Chapter Officers' E-Group. This is the place to go to find answers to your chapter related questions directly from your peers. As a Chapter Board Member you are automatically enrolled in the Chapter Officers E-Group for the length of your term in office. You can visit all of RIMS E-Groups at [www.RIMS.org/egroups](http://www.RIMS.org/egroups).

**7. Contact Manager** - The Contact Manager allows your chapter to combine your database with the RIMS database. The Contact Manager's classification and notes fields allow you to input, visualize, and act upon individual contact data. You can classify and sort all of your chapter contact information using RIMS Web site. Everyone who interacts with your RIMS Chapter can be classified how you wish using the personalized Chapter relationship fields. After adding your database into RIMS, you will be able to use the RIMS Web site to send blast e-mails and to download your chapter contact list into reports.



**8. Review your Chapter's Constitution and Bylaws** - Following the annual House of Delegates meeting, your chapter's Delegate should discuss any changes made to RIMS Constitution and Bylaws with the chapter's Board of Directors. Appropriate changes should be made to your chapter's Constitution and Bylaws immediately. If no changes are made to the Constitution and Bylaws, your chapter should still review them each year and update them as needed. Your chapter President or Former President should have the most up to date copy of the local bylaws. Be sure to send an updated copy to RIMS to maintain in your chapter's file. A RIMS Chapter Constitution and Bylaws Template is available online at [www.RIMS.org/chapterstationery](http://www.RIMS.org/chapterstationery).

**9. RIMS E-mail Manager and E-mail Templates** - Need to send an e-mail or meeting notice to all of the members in your chapter? RIMS has developed two extremely useful tools to make this job easier. By using RIMS E-mail templates, you can develop an html or text e-mail that can be used now and saved and/or updated for later e-mails. You can send these e-mail templates or other e-mails to members and/or prospective members using RIMS E-mail manager at [www.RIMS.org/EmailChapter](http://www.RIMS.org/EmailChapter). By using the e-mail manager to send out correspondences such as chapter notices, you will be using the most up to date membership roster available through RIMS database.

**10. Chapter Membership Reports** - Did you know that new members, expired members, expiring members, and all members and nonmembers reports are available for use on RIMS Web site at: [www.RIMS.org/MemberReportsChapters](http://www.RIMS.org/MemberReportsChapters)? Your chapter membership committee should run these reports once a month to welcome new members and to contact expiring or expired members. These are key steps in your chapter's membership development efforts, and these reports are available to make this task much more manageable.

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**11. RIMS PERK Program** - The Professional Exchange of Risk Knowledge or PERK program is a partnership between RIMS, its chapters, and its risk management industry partners that has been developed to provide quality programming, membership development opportunities, and relationships with key industry partners. These no cost programs are made available through the PERK program. These sessions have been developed by industry partners to make ready-to-use quality programs available to RIMS Chapters for use in their programming schedule. To learn more about RIMS PERK Program you can visit [www.RIMS.org/PERK](http://www.RIMS.org/PERK).

**12. RIMS Speaker Bureau** - Looking for a speaker for an upcoming chapter event? RIMS has developed an online Speaker Bureau, which enables you to search for a speaker by topic, location, or name. The Speaker Bureau also offers you the opportunity to list yourself as a speaker. For more information go to [www.RIMS.org/speakers](http://www.RIMS.org/speakers).

**13. RIMS Chapter Liaison Program** - Each year RIMS Chapters are assigned liaisons from RIMS Executive Committee. These individuals are great resources for your chapter. They may be available as speakers for one of your next events or act as advisors for your Board. For information on this program contact [chapterservices@rims.org](mailto:chapterservices@rims.org).

**14. Posting events on RIMS Calendar** - As a service to our members and chapters, RIMS has made an events calendar available on its Web site. Chapter Officers can post upcoming events on this calendar, including regional conferences and general membership meetings. After logging on to RIMS Web site you can click on Calendar of Events and submit a public event to add upcoming chapter meetings and events for all visitors to see. In addition, through the RIMS calendar your chapter has the option of accepting online registrations (excluding payments) for your chapter meetings and events. For more information contact [chapterservices@rims.org](mailto:chapterservices@rims.org).



**15. Officer Roster Updates** - Access to many RIMS Chapter Web tools including the ability to edit your chapter's Web site is directly linked to the officer roster that RIMS has on file for your chapter. When a chapter allows its board roster to expire, the chapter loses the ability to send blast e-mails, edit your chapter's Web site, manage chapter contact information, etc. The newly developed Chapter Officer Roster Tool on the RIMS Web site allows chapter officers to enter new chapter officer information and maintain continuity of access. The Chapter President, Delegate, Secretary, and Assistant Secretary can update your chapter's roster at <http://www.RIMS.org/manageofficers>. To avoid interruption in your officer's access to RIMS Web site tools, make sure to input your officer information for the coming term before the current term expires. Should your chapter officer roster lapse, RIMS staff can make the update for you. Please send your chapter officer roster to [chapterservices@rims.org](mailto:chapterservices@rims.org).

**16. Chapter Recognition Program (CRP)** - Did you know that each year RIMS recognizes the efforts of its chapters through the CRP? Chapters can self nominate for the following categories: Outstanding Chapter Programming, Advancing the Risk Management Profession and Outstanding Member Services. An award is also given to the chapter that performs the best in all three categories for Overall Chapter Excellence. Awards are presented each year at the RIMS Conference. Information about the CRP Program and other RIMS Awards can be found at [www.RIMS.org/awards](http://www.RIMS.org/awards).

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**17. RIMS Chapter Templates** - Stationery and regularly used templates for your chapter are available electronically in the Chapters section of the RIMS Web site. Visit RIMS Web site at [www.RIMS.org/chapterstationery](http://www.RIMS.org/chapterstationery) to download and use these templates for your chapter.

**18. RIMS Resource Library** - RIMS greatest resources are its members and the knowledge they contain. Just as members share personal experiences through E-Groups, now they can share the documents that are central to their work using the RIMS Resource Library. By submitting forms, documents, charts, and other information, contributors to the Library keep their peers from reinventing the wheel. Over a hundred searchable documents, classified by industry and interest, can be downloaded right now. Members are encouraged to contribute to and download from this growing resource.

**19. Other Online Resources** - In addition to the templates listed above, RIMS has made a number of resources for chapter officers available on line. These resources include Chapter Logo Guidelines, Insurance Summaries, and tips on including Associate members in your Chapter. You should familiarize yourself with these resources. For information regarding which officers have access to of the many different Chapter Officer Tools on the RIMS Web site please consult the Web Access Chart.



**20. RIMS Membership & Chapter Services Department** - RIMS is available to help each chapter officer with his or her questions and serves as a great resource for whenever you have a chapter related issue. Call 212-655-6041 or e-mail [chapterservices@rims.org](mailto:chapterservices@rims.org).

