

# Chapter Formation Handbook

*Thank you for your interest in forming a RIMS Chapter. A charter can only be granted to a new chapter with the approval of the Board of Directors (BOD) of RIMS. In order to gain BOD consideration, a proposed chapter must go through the following “Chapter Formation Building Blocks” as a minimum requirement. Please note: These “Building Blocks” may not occur in the order indicated and in some instances may happen simultaneously. RIMS Membership & Chapter Services Department is available for assistance during the formation process. Please contact [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org) to inform RIMS of your intent to form a chapter and to request assistance.*

## CHAPTER FORMATION BUILDING BLOCKS

- **Identify Interest**

Speak to local risk managers and determine whether or not there is a need and interest in forming a local RIMS Chapter. If there is a desire to form a local chapter, contact RIMS Membership and Chapter Services Department to receive guidance regarding the chapter formation process.

- **Recruit 10 Charter Corporate Members, that must include at least 20 Deputy Members**

A newly forming chapter must have a minimum of 10 Corporate Members that includes at least 20 deputies in order for a charter to be considered. Consideration will be given to exceptions on a case-by-case basis. Attached are the eligibility requirements. Chapter charter members must be corporate members and can fall into one of three categories:

- Member company of an existing chapter, which transfers to the new chapter (Members transferring to the new chapter must do so in writing on their company letterhead).
- Member company not affiliated with a chapter.
- Newly recruited member company (membership applications must be completed and submitted to RIMS with Board recommendation, and will be processed upon approval of chapter charter). ***Note: This will take place once dues are set.***

**Please Note:** If a company will only join upon the formation of a chapter, a letter of commitment can be included with the group’s letter of request for the Board of Directors.

Information regarding [RIMS Membership Categories](#) is available on RIMS Web site.

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- **Appoint Officers**

In order for the proposed chapter to function efficiently, it will need leaders willing to do the work necessary to ensure your chapter's success.

At a minimum, the proposed chapter should designate a President or Chairman, Vice President or Vice Chairman, Secretary, Treasurer and RIMS Delegate. The RIMS Delegate serves on RIMS House of Delegates and is your chapter's voice in the Society. In addition to these positions, the proposed chapter may also designate several other board members to serve as directors at large. Sample position descriptions are available on RIMS Web site at [www.RIMS.org/positiondescriptions](http://www.RIMS.org/positiondescriptions).

- **Select A Chapter Name**

Any new chapter must select a name for itself. RIMS requests that you choose a chapter name that is recognizable or unique to your geographic area. The name of the main city in the area or an internationally recognized landmark works best as a chapter name (i.e. Manitoba Chapter, Detroit Chapter, Golden Gate Chapter).

- **Set Chapter Dues**

Set your chapter dues. The amount of chapter dues varies widely from chapter to chapter. Dues range from \$10 to \$100 per deputy member for corporate representatives. Some chapters set low dues in order to attract members. Other chapters have high dues, which allow them to subsidize monthly meetings and events. In addition to Corporate/Deputy Member dues, you must also set dues amounts (if any) for Associates of the Society, Educational, Student, Retired, and Affiliate Members.

Your chapter has a choice to either collect chapter dues directly or have RIMS handle the billing of chapter dues at the same time that Society dues are collected. When RIMS collects the dues, the dues will be returned to your chapter as soon as possible (no later than 30 days after receipt). Your direction on how your chapter dues will be collected should be reflected in your Chapter's Constitution and Bylaws.

Chapter dues are collected in addition to the Society dues. Before deciding on a dues rate, some thought should be given to your expected annual expenses. Your chapter dues rate may be changed annually, but only at one specific time per year. A request will be sent out annually to your chapter's Treasurer to determine if dues will remain the same or change. This notice will be sent out only one time per year and will need to be returned by the deadline indicated in order to make the dues change for the following year.

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- **Prepare Chapter Constitution and Bylaws**

Prepare and approve your proposed chapter's constitution and bylaws. For your convenience, RIMS has provided a "Model Chapter Constitution and Bylaws" on the RIMS Web site at [www.RIMS.org/ModelChapterBylaws](http://www.RIMS.org/ModelChapterBylaws). The sample Constitution and Bylaws is consistent with the RIMS Constitution and Bylaws. Occasionally, the Board of Directors amends the RIMS Constitution and Bylaws. Whenever the Society's Constitution is amended, your chapter's Bylaws should also be amended.

Your chapter's Constitution and Bylaws may be narrower than the Society's but it may not be broader.

Your chapter should choose a RIMS Delegate who will be able to attend the one in-person meeting at the RIMS Annual Conference. Your RIMS Delegate should keep you informed of all changes made. Since the Bylaws is the guiding document of your chapter, all charter members and future chapter officers should familiarize themselves with this document.

- **Set Up a Meeting with Board of Directors Liaison or RIMS Staff Member**

Set up a face-to-face meeting or teleconference with a member of the Board of Directors or RIMS Staff member and the selected chapter officers through RIMS Chapter Services Manager to discuss the formation of your new chapter. This will give you a chance to ask important questions, settle outstanding issues, and review the final steps of applying for a charter. At this time you should also discuss the Board's commitment to membership development for your chapter.

- **Create Membership Development Plan**

There is a direct link between membership development, membership retention and the success of a local chapter. In order for your chapter to see long-term success it is necessary to have the Board focus on membership development for your chapter. In order for a new chapter charter to be considered by the Board of Directors, a Membership Development Plan must be submitted along with the letter of request. This plan should explain the intent of the Board to solicit new members and to retain existing members, as well as provide a few examples of how you plan on meeting these membership development goals. RIMS Membership and Chapter Services Department should be used as a resource throughout the process of requesting a chapter charter. If you need assistance in creating a membership development plan for your chapter, please contact RIMS at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).

- **Here is an example:** Our chapter agrees to actively solicit new members with a growth expectation of five member companies in three years and five additional member companies in the two years after that. In other words, a growth from ten member companies to twenty member companies in five years. In order to accomplish this goal we would call on at least four non-member companies per year. We would also develop a chapter Web site to update our members and potential members on chapter activities on a

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regular basis. In order to retain our chapter's members we would develop a chapter value statement that we could send out in thank you letters each year to our members. The value statement would discuss the benefits members receive from our chapter, i.e. networking opportunities, local educational opportunities, a local spin on hot topic issues in our industry, etc.

A potential for growth is important in order to keep up the momentum of the new chapter; however, flexibility is an important factor in any membership development plan. It is important to pursue all possible leads for your chapter through both retention and recruitment efforts. Membership development is essential to succession planning and the ongoing success of your chapter's programs and events.

Involve other RIMS member categories (Associates of the Society, Educational, Student, Affiliate, and Retired) in your chapter. All RIMS members can be a valuable addition to your Board and local chapter. Look for ways to make sure that you are including all of the members in your area. Although these other member types may not hold all of the same benefits as RIMS Deputy members, they can still provide value to your chapter. For example, these members can act as board advisors, committee members, speakers, chapter administrators, Webmasters, etc. To get some ideas on how you can involve Associates, visit RIMS Web site at: [www.RIMS.org/AssocChapInfo](http://www.RIMS.org/AssocChapInfo).

- **Submit a Letter of Request**

A letter must be written to the President of RIMS, asking to be accepted as a newly formed chapter 60 days prior to the Board of Directors meeting in which the request will be reviewed. The Board of Directors meets approximately 10 times per year. A list of names of the charter members with membership applications or letters of commitment, a list of the Board of Directors, a list of prospective members, a copy of the membership development plan for your chapter, and a copy of the new chapter's Constitution and Bylaws must be submitted for approval.

When your proposed chapter has completed the items above, your bid for a charter will be put before RIMS Board of Directors. RIMS Membership and Chapter Services Department will notify your proposed chapter regarding the Board of Directors' decision.

- **RIMS Connection**

Upon approval of your chapter's new charter, it is important to remain connected to RIMS. This will help to ensure the long-term success of your chapter. Your chapter will be assigned a RIMS Board of Directors Liaison each year in order to assist your chapter on a peer-to-peer level. It is also important to stay in touch with RIMS Chapter Services Manager with updates for your Board, Bylaws, meetings, etc. The Chapter Services Manager can assist your chapter with ideas on speakers, programming, leadership issues, etc. Contact RIMS Membership and Chapter Services Dept. at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org) or by calling (212) 655-6041.