

# RIMS®



## Chapter Officers Handbook

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**Risk and  
Insurance  
Management  
Society, Inc.®**

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## I. Introduction

The “RIMS Chapter Officers Handbook” is intended to serve as an informative resource and guide to the officers of local chapters of the Risk and Insurance Management Society, Inc. (RIMS). RIMS chapters are the front lines of a dynamic organization highlighting the field of risk management, and chapter officers are vital to the success of the local chapters, and ultimately, to the success of the entire RIMS organization. Designed to educate new or experienced chapter leaders in the administration and leadership of local chapters, this handbook covers a wide array of topics and situations that may arise during your tenure. Chapter officers and committee members are strongly encouraged to act as the voice of local chapters. The “RIMS Chapter Officers Handbook” provides a valuable tool by focusing on the overall mission of RIMS, and the 7 Keys to Chapter Success (listed below). These Keys are essential to building and maintaining successful chapters:

1. Leadership
2. Planning
3. Membership Development
4. Programming
5. Communication
6. Chapter Administration
7. Recognition

The “RIMS Chapter Officers Handbook” is also available online at [www.RIMS.org/handbooks](http://www.RIMS.org/handbooks).

## II. About RIMS

### **RIMS MISSION STATEMENT:**

The Risk and Insurance Management Society, Inc. (RIMS) serves its member entities by proactively providing the highest quality products, services and information to manage all forms of business risk.

### **OBJECTIVES:**

- Be the leading association for risk management.
- Create a highly effective interactive communication system to elicit, understand and respond to member and chapter needs.
- Set direction for and deliver relevant risk management educational opportunities.
- Work together with chapters to strengthen and develop a responsive and productive network.
- Define, develop and pursue strategic alliances with internal and external entities to meet member needs and strengthen RIMS role as an association for its members.
- Actively advocate members’ interests.
- Be the risk management authority on a broad array of business risks.



## **STRATEGIC PLAN:**

The strategic plan focuses on how RIMS will accomplish its mission and objectives over the next 3 to 5 years. Given that the scope contained in the new mission statement has shifted to focus on the member entity, it is appropriate to describe the manner in which the components of the strategic plan will be carried out.

Each component of the plan is based on the fundamental idea that RIMS needs to be flexible and proactive, as well as utilize advanced technology for a timely response in a rapidly changing environment.

In addition to integrating strategic thinking and incorporating quality initiatives into all areas of concentration, the plan also acknowledges RIMS interest in forming partnerships with internal/external organizations and experts.

## **Strategic Plan Goals:**

- To proactively serve all member entities by providing their risk management function with state of the business information and other resources on all forms of business risk in a manner and time frame consistent with the way they operate.
- To deliver leading-edge educational and professional development products that encompass all business functions and risks by utilizing universities, industry networking and RIMS sponsored classes, as well as employing computer technology and other multimedia delivery mechanisms.
- To partner with the local, regional and committee levels of RIMS to promote the value of membership through proactive products and services in a manner which facilitates the success of chapters.
- To promote the integration of risk management within an entity's business decision making processes by emphasizing the ultimate value to be realized by member entities and their constituents.
- To create networks on all government levels that positively influence and effect change in government regulations and legislation that have an impact on risks and operations of member entities.
- To provide members with cost-effective interactive forums for networking through identification of common member needs and industry segments, and utilization of timely, accessible and interactive communication tools and relevant strategic alliances.
- To create and promote quality risk management practices.

## **RIMS FACTS:**

- The Risk and Insurance Management Society, Inc. (RIMS) is a proactive voice on behalf of risk managers, dedicated to supporting their function and enhancing their profile as vital elements in organizational success. Founded in 1950, RIMS represents over 4,500 industrial, service, nonprofit, charitable, and governmental entities. The Society serves nearly 10,000 risk management professionals around the world.



- The cornerstone of risk managers' peer-group interaction is RIMS 80 local chapters, located throughout the United States, Canada, Mexico, and Japan. The chapters provide members with regular meetings where risk managers exchange ideas and engage in networking with other local companies and industry counterparts. Chapters are the scene of social, educational, and civic activities. Local chapters also team up to sponsor RIMS Regional Conferences, which extend networking opportunities even farther. In addition, chapters are instrumental in keeping members informed of what's happening on the leading edge of the risk management discipline in every sector of the economy.
- RIMS membership also facilitates contact with a broad array of service providers in the insurance industry, including academicians, regulators and elected officials, as well as with subject matter specialists and technicians from many backgrounds.

## RIMS MEMBERSHIP BENEFITS:

- The [RIMS Annual Conference & Exhibition](#) is widely recognized as the definitive risk management and insurance event. It is the largest gathering of risk managers and insurance professionals in the world. Annually, about ten thousand participants, including over 400 exhibitors, tackle the latest issues facing the industry.
- RIMS conducts interactive [workshops and public seminars](#) on critical aspects of risk management and insurance for risk professionals and others involved in managing risk. These educational sessions are held throughout the United States and Canada. Onsite programs are implemented upon request for the training of staff in a specific company. RIMS also conducts workshops that earn attendees credit towards the [RIMS Fellow](#) designation, the premier designation for risk professionals. The [Spencer Educational Foundation, Inc.](#) awards annual scholarships to full-time risk management students and educational grants to others.
- The Society publishes the monthly [Risk Management Magazine](#); the bi-monthly [RIMSCOPE](#) online newsletter; an online [Risk Management Buyers Guide](#); the online [RIMS Benchmark Survey](#); [Risk Management Compensation Survey](#); and a variety of books on industry related topics.
- [RIMS Quality Improvement Process](#) (QIP) is a comprehensive program designed to guide and facilitate quality improvement. One component of the process is the QIP Guidelines for Performance Expectations. Risk managers and their industry partners can use these guidelines to improve communications, develop performance expectations agreements, and evaluate the performance under those agreements. The QIP includes the Broker and Risk Manager Partnership Tool and the Underwriter and Risk Manager Partnership Tool.
- The RIMS Web site at <http://www.RIMS.org>, includes innovative tools such as [RiskWire](#) – a customized risk management news service; Industry related [E-Groups](#) – an online networking tool that reaches thousands of risk management professionals; [ASKRIMS.org](#) – the premier risk management search engine; a [Career Center](#); and a searchable [Risk Professionals Directory](#).
- RIMS monitors federal, state and provincial regulation and legislation affecting risk management and employee benefits. RIMS also maintains contacts with legislators and



regulatory agencies to make sure the voice of the RIMS membership is heard. The Society actively led support for the Terrorism Risk Insurance Act (TRIA) and continues an alliance established in 2002 with the Occupational Health and Safety Administration.

## **RIMS CONSTITUTION & BYLAWS:**

[Click here](#) for the most up to date copy of RIMS Constitution & Bylaws.

## **RIMS VOLUNTEER LEADERSHIP STRUCTURE:**

For up to date information regarding RIMS volunteer leadership, [click here](#).

## **RIMS STAFF:**

RIMS operating staff is located at 1065 Avenue of the Americas, New York, NY 10018. For questions concerning RIMS Chapters, please contact RIMS Membership and Chapter Services Department at (212) 655-6041 or [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org)

## **III. Chapter Roles & Responsibilities**

### **7 KEYS TO CHAPTER SUCCESS**

It is the responsibility of your chapter's president to delegate responsibilities to other board members and committees, and to manage the volunteers who have assumed roles on your chapter's board. By using the 7 Keys to Chapter Success listed below, you will be able to create both short-term and long-term plans for your chapter, as well as assign key tasks to your board and committee members.

1. Leadership
2. Planning
3. Membership Development
4. Programming
5. Communication
6. Administration
7. Recognition

### **1. LEADERSHIP**

#### **Recommended Structure:**

It is important for chapters to have a strong organizational structure and governance. The following is a recommended "core" organizational structure. These positions typically make up the core of a chapter's board of directors:

President  
Vice President  
Secretary  
Treasurer

# Chapter Officers Handbook



RIMS Delegate  
Membership Director  
Programming Director

Ideally, the chapter board should meet regularly or, if possible, on a monthly basis. We suggest that your chapter meet monthly in order to track the progress of projects that the volunteers are working on and to keep things on track for the chapter. Some smaller chapters and some chapters that cover large geographical regions may choose to meet on a quarterly basis. If your board is not able to meet monthly, consider hosting conference calls in between board meetings to keep everyone up to date.

The board's function is to act on behalf of the general membership and to establish chapter policies in accordance with the chapter's bylaws. In order for the board to function, the chapter must have clearly written bylaws, a mission statement and goals. We recommend that the chapter review these items on a regular basis to make sure they accurately reflect the actions of the board/chapter.

In addition to the board, we recommend establishing committees to work on various tasks, for example, membership, Web site, etc. It is important to remember that a board of directors and committees serve different purposes. A board of directors thinks strategically about the chapter and makes decisions based on its committees' recommendations. Your chapter's board of directors gives its committees mandates and the committees work to complete the tasks to fulfill the wishes of the board.

Some chapters may not be large enough to support a committee structure. Make sure that your chapter's board meetings are not spent doing the work of the chapter. Each of your officers might act as a chair of a particular area (programming, membership, etc.), but work on their projects should be done outside of board meetings. Reporting on a project's status and decision making for the benefit of the chapter should be the focus of the board during meetings.

Active participation in committees strengthens the sense of membership for the individual and the chapter. Once committees have been appointed, it is important for them to develop their own goals and objectives and to report on their accomplishments. A committee structure also develops a larger pool of volunteers and helps to develop future leaders for your chapter.

For sample chapter officer position descriptions and guidelines on how to write a volunteer job description, please visit [www.RIMS.org/positiondescriptions](http://www.RIMS.org/positiondescriptions). You can update your chapter's officer roster by going to [RIMS Officer Roster Update](#) in the chapters section of RIMS Web site.

## **Tips on Chapter Leadership:**

- Identify future chapter leaders.



- Create leadership succession within the chapter.
- Attend RIMS [Building a Successful Chapter- A 'How To' Workshop](#) in conjunction with RIMS Conference. The BSC is a workshop 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. The workshop focuses on key chapter areas: membership, leadership, communication, programming, etc.
- Encourage and reward local volunteer involvement.
- Participate actively in [RIMS Chapter Officers E-Group](#) to improve communication and peer sharing between chapter leaders.
- Disseminate information about RIMS to your chapter's board and volunteers.
- Develop short-term and long-term goals for your chapter.
- Nominate candidates for RIMS leadership committees.
- Maintain leadership that is open to advice and suggestions; and solicits ideas for improvement.
- Update your officer roster online using [RIMS Officer Update Tool](#) or provide RIMS with a copy of your chapter's officer roster each year, as well as any updates throughout the year.

## 2. PLANNING

### Pre-Plan:

- Take time to organize your thoughts and desires for your year as a chapter leader prior to your initial planning meeting or retreat. Think about what you would like to see the chapter accomplish in the coming year and over the long term.
- Meet with the outgoing chapter officer you will be replacing to discuss what worked and what did not work during their tenure.
- Have the executive board (president, vice president, secretary, treasurer, and RIMS Delegate) meet before the entire board gets together to make sure that you agree on strategy and issues.
- If need be, make key contacts to tie down open board positions prior to the initial planning meeting.
- Ensure that all chapter board members have received a copy of this handbook to use as a guide throughout the year.

### Planning with your Chapter's Board

- Set up a planning meeting or retreat so that the whole board (including committees) can create a plan for the coming year and a long-range plan (this can be a separate board meeting each year) for the chapter. You can also use this time to determine how your chapter will achieve agreed upon goals.



## Running an Effective Planning Meeting/Retreat

- Start planning early and think about short- and long-term goals, as well as leadership succession.
- Have an agenda:
  1. Identify players and get their commitment prior to the meeting.
  2. List each meeting participant on the agenda. Place their names next to their discussion topics or areas of responsibility.
  3. Send a meeting notice to the board two or three weeks before the meeting, attaching a copy of the “preliminary” agenda. Ask for questions, additions, and comments, along with the board member’s commitment.
  4. Send a reminder a few days prior to the meeting to confirm attendance and the agenda.
  5. For maximum productivity, keep focused and follow the agenda.
  6. Other recommended agenda items include:
    - Programming (e.g., educational, informational, networking, etc.).
    - Focus on membership development: How can we recruit prospects?
    - How can we welcome new members and keep them interested?
    - How can we keep our members?
    - How can we get members involved on the board?
    - Development of your chapter’s Web site.
    - A treasurer’s report or other financial and budget information.
    - An update on what is happening at RIMS.
    - RIMS Conference and BSC Workshop – who will be attending this year?
    - The Chapter Recognition Program.
    - Create a schedule of events for the entire year.

Discuss what is expected of all board and committee members, so that all involved will understand what their commitment level will be. Change and update the plan throughout the year, as needed. Involve all board members and committee members throughout the year. Determine who is best for each job opening, and appoint the right people to the right jobs. Ask your volunteers about their interests, experience and future plans for involvement on your chapter’s board.

## Succession Planning:

- Ask each officer, director, and committee chair to recommend his or her successor for emergency situations.
- Develop a formal succession plan—identify potential members to fill leadership positions, and, if possible, assign two or three names per position.



- Name committee vice chairs. Vice chairs become the committee chairs the following year, but could fill the position sooner in an emergency.
- Increase board size to increase the pool of potential leaders.
- Overlap committee member and board member terms to make sure that the whole board does not expire/turn over at the same time. This will allow for continuity for your chapter's activities.
- Contact RIMS members for recommendations for new volunteers. Use your chapter's membership, prospect and meeting attendance lists as resources to find new volunteers for your chapter.

## Long Range/Strategic Planning:

Once you have established a one-year planning process in your chapter, the next step to consider is the implementation of long-range or strategic planning. Long-range planning can assist your chapter in accomplishing organized, continuous and directed growth. Since you are looking to build consensus and direction over a longer period of time, you may wish to invite potential future leaders to be part of the discussions, allowing them to be a valuable resource.

Before you can begin the planning process, you will need a clear sense of your chapter's mission and direction. This can be done prior to, or as part of, your planning session. A good mission statement summarizes your chapter's goals, yet is definitive enough to determine whether a potential program or activity will support it. Creating a mission statement allows you to delineate goals and formulate a specific action plan. Place your chapter's mission statement on your Web site, letterhead, chapter newsletter, etc.

Developing a strategic plan is a three-step process: (1) design, write and produce plan; (2) implement the plan; (3) evaluate the results to stay on target and support future planning. Keep the following points in mind when developing your Strategic or Long-Range Plan:

- A comprehensive long-range plan will not only assist your chapter's current board in achieving its goals, but it will serve as a road map for those who follow.
- Identify core leaders at the board level who would like to move up the leadership ladder for the chapter. What are your board members' long-term plans involving their volunteer work with RIMS?
- *Assess current environment/needs.* What challenges or issues do your chapter and its members face? (Prior to answering this, we recommend that a member needs survey be conducted.) Example: Our RIMS chapter needs to have greater name recognition.
- *Set goals.* Gain a consensus as to your chapter's goals for the next two years. Example: To increase public awareness of our RIMS chapter.
- *Establish Objectives.* Further define the goals and provide steps for achieving them. Example: To develop a comprehensive RIMS chapter awareness program directed at CEO's.



- Formulate strategies. Develop methods for accomplishing your objectives. Example: Work with the editor of the weekly business section to start a column on the importance of risk management.
- *Break down strategies into measurable tasks.* Specify the actions necessary to accomplish your strategies. Example: One person makes an appointment with the editor to discuss the idea for the column and then another will develop the format for the column, etc.
- *Assign tasks with specific deadlines.* Assign specific tasks to specific individuals. Little will be accomplished if no one is given a definite assignment with concrete deadlines.
- *Evaluate success by monitoring your plan.* Recognize your successes and make changes in areas where progress is not being made in a timely manner.
- *Assess the board* and determine whether or not you need new blood.
- *Assess the membership* and determine who is NOT participating in a volunteer role. Have the board develop a plan to communicate with those individuals.
- If attendance is weak at general membership meetings, try a “name” speaker to boost attendance, and use that meeting to recruit new and renewed membership participation.
- For meetings, try something different in terms of time and place.
- *Talk to chapters that have been successful*, and learn from their efforts. A great opportunity to do this is to attend one of RIMS Building a Successful Chapter - How-To Workshops (BSC).
- *Use RIMS Chapter Officers E-Group* to communicate with fellow chapter officers from around the world. Ask questions, get answers, and share ideas. Exclusive to chapter officers, this virtual peer-to-peer networking opportunity is available through the RIMS Web site.
- *Host an invitation-only round table* for senior level risk managers to provide them with a great networking opportunity. This event can give you a chance to enlist their support and get them re-involved with the chapter.
- *Hold a long range or strategic planning session* for your chapter’s board during the course of the year, and consider where your chapter would like to be in 3-5 years. This long-range look can be your legacy to your chapter after you move into your role as past president.
- Look at the strengths, weaknesses, opportunities, and threats (SWOT) of your chapter. To learn more about conducting a SWOT Analysis for your chapter, [click here](#).

## Follow-Through:

- Check-in occasionally to make sure that the assigned jobs match individual interests, and reassign tasks if necessary. To maintain retention, ensure volunteers feel useful.
- To guarantee that the plan is successful and timely, establish a reporting schedule to track the progress of events.



- Hold a mid-year meeting to assess recent accomplishments and decide what needs to be done for the rest of the year to meet chapter goals.

### 3. MEMBERSHIP DEVELOPMENT

Recruiting new members is one of the most important tasks that your board will take on for your chapter. A growing chapter is a vibrant and healthy chapter, and the only way to ensure that your chapter continues to be a strong, powerful voice for risk managers and the service providers in your area is to recruit new members. New members will enlarge and strengthen your chapter's knowledge base, raise dues revenue, and increase the pool of individuals that can fill a variety of voluntary roles. Below are a few suggestions on how to increase and retain your chapter's membership:

- Appoint a membership chair and committee to take the lead on all membership development activities.
- Identify key prospects within your chapter.
- Make calls on prospects to recruit them as members.
- Welcome new members to RIMS and your chapter.
- Recruit volunteers by involving new and existing members in board activities.
- Develop retention plans for your chapter by:
  - Identifying companies or individuals that could drop their membership.
  - Calling on existing members to determine their needs.
  - Involving the entire board and, if possible, past officers in membership recruitment/ retention efforts.
- Displaying RIMS membership materials at all meetings.
- Promoting RIMS Affiliate Membership. In the event an existing RIMS Deputy Member loses his/her job, they are eligible to become an RIMS Affiliate Member. If the person has been an active member of RIMS, your chapter may want to consider paying the dues for his/her membership.
- Conduct a local membership campaign to recruit new members. For ideas on how to conduct a membership campaign, refer to the [Membership Drive Handbook](#) available on [RIMS Web site](#).
- For more detailed information regarding the membership committee's or chair's role for your board, please review the [Membership Director Handbook](#).

### 4. PROGRAMMING

Your chapter's programs are a major reason for your chapter's success, so it is important to find ways to continue to bring good events to your members while easing the administration associated with them. Quality programs and events will help to retain your current members and to recruit new members. Up to date meeting topics offer value to your members by providing them with education on today's hot topics. Chapter events also offer excellent opportunities for your members to network. Consider some of the following tips to help make your chapter's calendar a hit with your members, while making the job of planning your programs more manageable.



- Use a committee or split tasks amongst multiple board members to plan your chapter's programs. Do not use one person to do the job. Consider assigning each board member one of the programs for the year. This will ensure that each board member is responsible for at least one of your chapter's events and no one person is planning the whole year's events.
- Conduct regular surveys of your chapter's membership to identify program needs/topics. It is important to assess the needs of your local audience to determine what type of programs you should hold, in order to make sure that you are giving your members what they want.
- Hold periodic planning sessions to discuss programs.
- Examine attendance at your meetings. Has attendance been dropping off? Are your attendees always the same people? If you need to shake things up for your chapter, consider different options for the locations and times of your membership meetings. You can also consider a new format, like a panel discussion or roundtable.
- Share information about local programs with other risk professionals, by adding your chapter's events to [RIMS Online Calendar](#). Fill in the appropriate information regarding your event, which will be promptly reviewed and approved by a member of RIMS staff.
- Publish a schedule of local activities on your chapter's Web site or newsletter.
- Host a joint meeting with other organizations associated with risk management. Do not overlook the value of joint meetings with other local groups such as the Society of CPCU, Financial Executives Institute, American Society of Safety Engineers or Bar and CPA Associations, to cite a few. The meeting itself should present a topic of mutual interest. Each group should assign a member that is responsible for coordinating the event. Look to such meetings as a way to expose others to the risk management profession. Depending on the group involved, it could be useful for each president to describe their own group's activities, their members' job responsibilities, and then exchange literature.
- Research speakers for your meetings - RIMS members are a much-courted group. Chapters should feel free to invite anyone involved in the risk management community to address them. It is still possible to get many speakers without paying as long as it fits into their schedules. Do not assume that you can't get a speaker because he or she is in another state. It doesn't hurt to ask. He or she may have business in your area and can combine the speaking engagement with business. Following are some sources for obtaining speakers:
  - Involve chapter members as both moderators and speakers. Every chapter has, among its membership, experienced risk managers who may be less active than they once were. Invite them to address the chapter and/or participate in a question and answer session.



- Use the RIMS PERK (Professional Exchange of Risk Knowledge) Program to fill in gaps in your chapters' programming schedule. The PERK Program is a partnership between RIMS, its chapters, and RIMS industry partners, which provides quality programming and speakers to the chapters at no cost. To learn more about RIMS PERK Program go to [www.RIMS.org/PERK](http://www.RIMS.org/PERK).
- Draw upon member company expertise within your chapter's member organizations. Corporate attorneys, safety directors, financial executives and human resources personnel should be considered. When such a speaker is invited, members should be encouraged to invite the speakers' counterparts in their own organizations.
- Consider inviting a member of RIMS Board of Directors or a RIMS staff member to address your chapter once a year to bring the members up to date on RIMS activities. Each RIMS Board Member has been assigned a number of chapters in order to further communication between RIMS and the chapters. If you do not know who your RIMS Board of Directors Chapter Liaison is, a list is [available online](#).
- Use your chapter's Associates of the Society and other service providers. Your chapter's service providers may have the best resources and the easiest access to qualified speakers. If you use this resource you should certainly set some ground rules ahead of time: no sales pitch, no company name and logo on each slide or power point screen, or whatever other rules your chapter wants to set. Do not fall into the trap of only having service providers as speakers, as it may lead to a drop in your chapter's attendance. It has been our experience that risk managers will take time out of their busy schedules to attend a meeting presented by another risk manager.
- The [RIMS Speaker Bureau](#) is an online resource where your chapter can find speakers. You can search by topic, location, speaker name, etc. Ratings and evaluations are also provided if they have been submitted to RIMS. Approximately 6,000 speakers are listed. The speakers consist of industry risk managers and services providers, as well as others related to the risk management profession. Many of these speakers have already spoken at the RIMS Conference or at chapter meetings. Check out the [Speaker Bureau](#) online for more ideas for presenters for your upcoming chapter meetings.

## Fundraising

Many RIMS chapters hold fundraising events, with proceeds donated to a charity. These donations should be made to a risk management-related organization or cause. For example, your chapter could use proceeds from a fundraising event to purchase fire extinguishers for a local shelter or orphanage. There are also opportunities to more directly benefit the risk



management profession through scholarships. By donating the funds to a scholarship for risk management studies, your chapter is having a direct impact on the future of the profession.

Some opportunities for donations include:

1. The Spencer Educational Foundation.
2. The William H. McGannon Foundation for Advancement of Risk Management (MCFARM) in Canada.
3. The Anita Benedetti Student Involvement Program.
4. Locally established scholarships at nearby universities.
5. Other risk management related donations.

Consider hosting a fundraising event for your chapter. Proceeds from a golf outing, annual meeting or year-end event are an excellent opportunity to raise money for a good cause.

Money collected for a certain purpose must be used/distributed the way that it was intended. For example, if your chapter hosts a fundraising event to benefit the Spencer Educational Foundation, then the proceeds from that event must be given to Spencer.

## 5. COMMUNICATION

Communicating your chapter's message allows for successful programming, membership recruitment and retention, and increases awareness of the risk management profession in your local market place. Communication is also important when dealing with your volunteers. It is important that everyone on your chapter's board and committees is kept up to date and informed about projects, meetings, etc. There are a number of different tools available to help your chapter communicate its message. Try to communicate often and in a variety of ways using the following resources and suggestions:

### Communicating your message:

- Display information about RIMS products and services at meetings (i.e. membership applications, professional development opportunities, etc.).
- Send chapter communications (e.g. newsletters, meeting notices, Board minutes, etc.) to RIMS Membership & Chapter Services Department at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).
- Make sure that an open line of communication exists between board members and committees.
- Try to hold frequent board meetings either in person or via conference call to make sure that everyone is up to date on chapter activities and to follow-up on action items.
- Provide agendas and any necessary documents prior to board meetings, so that volunteers can be prepared for the meeting.

### Chapter Web Sites:

Your chapter's Web site can be one of its most powerful marketing and communication tools. It is also a reflection of the chapter and the Society. In addition, it can act as an archive for



your chapter's history. RIMS has made resources available that enable each chapter to create and maintain its own site right from the RIMS Web site. Make sure that someone on your chapter's board has been assigned the task of Webmaster; the individual who makes changes and maintains your chapter's Web site.

RIMS staff can set up a time to help you create and update your chapter's Web site. A brief tutorial on how the Web site software works can be done via conference call in less than one hour. You will be provided with written instructions and some helpful hints to make your job as Webmaster easier. For more information on how to create a Web site for your chapter you can contact RIMS at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org). Once a Web site has been created, it is extremely important that it is maintained and kept up to date. Review RIMS Chapter Web site Guidelines for more information. Use the [Webmaster Handbook](#) or contact RIMS for support.

Having a Web site for your chapter is a great way of dispensing information to RIMS members and others in your local area seeking information. Your chapter's Web site can be linked to the RIMS site for maximum visibility by all members.

Your chapter's Web site should highlight, not replace, existing methods of communication amongst chapter members and leadership, and should be used to enhance the communication methods that already exist to make members aware of what is happening in your chapter. You will need to keep in mind that not all members will have access to the Web site or be able to receive e-mail.

As with any publication, currency of Web site material is essential. Out of date information is not useful. Chapter leadership should consider the Web site as part of the overall communication system set up within the chapter. Things to consider: How frequently will the site be updated? How will the information be submitted to the Webmaster? Will electronic materials be posted at the same time as the printed version or will there be a delay?

## **Meeting Notices:**

Prior to your chapter's general membership meetings you should send out a meeting notice to all members. When writing a meeting notice, always remember to answer the key questions – Who, What, When, Where & Why?

- Who is the speaker?
- Who is your intended audience?
- What is the topic?
- What is the time of the meeting?
- What is the cost to attend?
- When is the meeting?
- Where is the meeting being held?
- What do you know about the speaker (bio)?

By answering these key questions you will be able to write an informative, simple meeting



notice. Always look at your meeting notice with the eyes of someone that rarely shows up. Have you enticed them with ample information to make them take action? Keep in mind that detail does not necessarily mean long!

*Please note: Many of the meeting notices that are sent out today are sent out electronically and can even be an e-mail with a link to your chapter's Web site.*

The following are some tips on how to make the most of your next meeting notice:

- Catch their attention! Use a catchy title to highlight what your event is covering.
- Highlight any big name speakers and include as much pertinent information as possible.
- Use the official RIMS logo along with your chapter name and chapter logo (if applicable).
- Include the date, time, and location for the event.
- Include information regarding the topic and the speaker(s).
- Make sure that you have included member and non-member pricing information for the event.
- Include contact information. Include a board member's name, phone number, and/or e-mail address on the announcement, so that participants can ask questions, register, etc.
- Include a space for the registrant's name, company, title, address, phone, fax, and e-mail, so that you can collect the most up to date contact information for your attendees.
- Explain how individuals can pay for the event (check or credit card), as well as how they can register for the event (fax, online, e-mail, etc.).
- Create your meeting notices well in advance! Provide information regarding your event early and send reminder notices.
- Include event information on your chapter's Web site.

## Newsletters:

Good communication skills are critical to the success of an organization hoping to improve, enhance and strengthen its member relations. The modern world of electronics and computers has made it very easy for chapter officers to communicate with their members, and most newsletters are now sent out electronically and/or posted on chapter Web sites. Chapter newsletters are viewed by your members as a benefit to belonging to the local chapter. It is easy to create a newsletter with RIMS online [Chapter Newsletter Templates](#).

## Logos

Logos help establish a distinct look and improve the effectiveness of communications. Use the [RIMS Communications Handbook](#) to review the rules for using the RIMS logo. RIMS can help you create a distinct chapter logo for your chapter. For more information, see the



online [RIMS Chapter Logo Guidelines](#).

## Getting Started

The first thing you need to do is decide who is going to be responsible for coordinating this project. You will have to recruit a volunteer to serve as editor of the newsletter. The editor should be someone who has an interest in writing, and is willing and able to commit the time necessary to produce a good newsletter. This position does not have to be filled by an officer.

Once you have found an editor, you must be willing to provide whatever resources are needed to publish the newsletter. Along this same line, the president should volunteer to write a regular “Message from the President” article for each edition. Your chapter’s newsletter should include a combination of the topics suggested below:

- Local news and events.
- A welcome note from your chapter’s president.
- A calendar of upcoming programs and events for your chapter.
- A listing of your chapter’s officers.
- New members.
- Chapter success stories.
- Recognition of chapter board members and volunteers.
- An invitation to become involved in RIMS.
- Chapter progress on issues significant to Risk Managers.
- Chapter services available to members.
- Reports on Board and Chapter meetings.
- Developments in your local area that might affect your members.
- Risk management tips.
- Nominations, elections, and appointments of officers.
- Regulatory issues.
- RIMS Professional Development Courses.
- Reports on RIMS meetings (i.e. House of Delegates Meeting).
- Editorials.
- Requests for volunteers.
- A column where members can submit questions.
- Job listings.
- Surveys.
- An update of what’s new at RIMS.

## The following are tips for the editor of your newsletter:

Preparing and organizing your newsletter copy will be easier if you first determine what you want to accomplish by sending the newsletter to your members. Listed below are some suggested newsletter objectives. You may also want to discuss other specific issues that you want to address with the other board members.



- **Objective:** To inform members in a timely fashion of current developments such as proposed legislation, government regulations, etc.
- **Objective:** To inform members of what their chapter is doing for them. (What they are receiving for their dues).
- **Objective:** To effectively communicate to members the value of their participation in the organization.
- **Objective:** To communicate information about RIMS on a Society level.

Style will vary from chapter to chapter. Some editors prefer a formal, journalistic style, while others opt for a more personal touch. Remember it is the content that is important. If you are having trouble with the layout, most computers have templates or will have guidance on how to set up a newsletter. It is a good idea to publish the newsletter on a regular basis. It is always better to publish smaller newsletters with current information, than to wait until you have collected a lot of news, as you may be publishing old news.

Please be sure that a copy of your chapter's newsletter is sent to the RIMS Membership and Chapter Services Department so we can have a file for your chapter's history. You can send your newsletters to [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).

## Public Relations:

"Public relations" is defined as "the art or science of establishing and promoting a favorable relationship with the public." Chapters should plan and undertake specific public relations activities to communicate with and be recognized by key groups, such as local businesses, industry groups and important constituencies. The purpose of public relations is to influence and provide information to key target audiences.

By following a few simple guidelines, a public relations plan can have positive and lasting results for your chapter and your members. Public relations can help increase your chapter's visibility, increase participation in your meetings, notify your business community of current chapter activities, enhance the prestige of your programs, and increase understanding of the risk managers' role in their corporate environments. Often a good public relations resource is your company's own PR or corporate communications department. They respond to media requests daily and can help you by giving the company's perspective on issues. They can be a resource for lists of editors in your local newspapers.

## Where to start:

- Do you have an upcoming event, fundraiser, newly elected president or interesting guest speaker?
- Communicate information regarding an upcoming event, fundraiser, guest speaker, etc. to the media (newspapers, radio, TV) through a press release.
- Use the formula below for writing a release:
- Include a contact name and telephone number at top of page for a person the press can contact for additional information.



- Create a headline that is 8-10 words long.
- Make sure the 1<sup>st</sup> paragraph includes WHO, WHAT, WHEN, WHY, and WHERE.
- Include additional information about the event or program in the 2<sup>nd</sup> paragraph.
- Use the 3<sup>rd</sup> paragraph for a generic statement about your chapter and RIMS.
- Use this standard text for the bottom of every press release:

*The Risk and Insurance Management Society, Inc. (RIMS) is a not-for-profit organization dedicated to advancing the practice of risk management, a professional discipline that protects physical, financial and human resources. Founded in 1950, RIMS represents over 4,500 industrial, service, nonprofit, charitable, and governmental entities. The Society serves nearly 10,000 risk management professionals around the world.*

- Put the release together with any additional information you have about the event, such as a flyer.
- Include background about RIMS. If you have an appropriate black & white 5 X 7 photo for the release, include it.
- Send the release to the business editor if it is about a meeting or speaker. If your event is a fundraiser, send it to the lifestyle editor, as well as the calendar editor. Let the photo editor know about the event and any personalities or business leaders who will be participating and give them a time for sending a photographer. Just phone the newspaper or station and ask for the name of the appropriate contact and they will give it to you.
- Designate someone from your board to meet any press that attends the event, as well as introduce any attendee the reporter would like to meet. As a rule, media attend any meeting or event complimentary. The reporter's host should introduce him/her to your executives and key members. Also, let the reporter know whom to contact if there are any follow up questions. Always check with your speaker to ensure that media attendance is OK prior to the event.
- Respond to media requests and questions. The first type of request that your chapter may receive from the local media is to find a local resource person with a particular expertise on a subject, to be used as a resource for an article. Chapter officers are excellent resources for this type of query and should be encouraged during the interview to mention their RIMS chapter affiliation and title. Sending out press releases when a new slate of officers is elected will introduce your chapter to the local reporter for follow up when he/she is doing a story on a local event which calls for a risk management viewpoint. The second type of request that you may receive from the press is for information on a position that RIMS has taken and request for a quote on that subject. These questions should be referred to the Public Relations Manager in New York (212-655-6059). The RIMS president and/or the appropriate RIMS Board of Directors spokesperson will respond.



## **Mail vs. E-mail:**

Communicate with your members on a regular basis through e-mail, 'snail mail,' newsletters, Web sites, meeting notices etc., in order to make them feel connected to RIMS and the local chapter. Make sure that you are using the most current membership information when sending out chapter information by downloading current membership reports, or by sending e-mails through the [RIMS E-mail Manager](#). If you send e-mails to your members from your personal e-mail account, make sure to use the bcc field so that e-mail addresses are not shared. This also prevents someone from replying to all.

In recent months, legislation has been passed regarding e-mail and spam. Be selective in the information that you send out to your members. Be respectful of members' wishes to not be included on your mailing lists by informing RIMS when they make that request. Never release e-mail addresses to a third party.

## **The Personal Touch (Phone Calls & Face-to Face Visits):**

Although this type of communication is often the most time consuming, it also usually reaps the biggest rewards. An occasional phone call by a board member to check in on your local members can make a big difference by making them feel connected to their local chapter. It also helps them to feel welcome at the next meeting. Personal phone calls or visits can provide great opportunities to talk about what your members are looking for from the local chapter. You will also have the opportunity to discuss their membership status and future plans with RIMS.

## **Online Stationery and Templates:**

RIMS has created a number of other resources to help with communication. easy-to-use [templates](#) for chapter stationery, newsletters, certificates, etc. You can visit [RIMS Web site](#) to discover the templates that are available for your board.

## **6. ADMINISTRATION**

### **Incorporation:**

In order to protect the officers and directors of your local chapter, all RIMS Chapters must be incorporated. In every state or province there is an agency responsible for registering and maintaining records on corporations. In the USA, this agency is usually known as the Corporation Commission of the Secretary of State. Information on a corporation's status can be obtained by writing or calling the appropriate office. For your convenience, RIMS can have CT Corporation maintain your chapter incorporation status and records each year at your chapter's request. This service is offered at an annual fee that will be deducted directly from the dues that are collected for your chapter by RIMS.

If your chapter has not yet been incorporated, RIMS will assist in the filing for incorporation.

Contact RIMS Chapter Services for more information at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).



## **Chapter Constitution and Bylaws:**

Each RIMS chapter has its own constitution and bylaws, which are directly related to RIMS Constitution and Bylaws. Whenever a change is made to RIMS Constitution and Bylaws, it is communicated to the RIMS chapters, and your chapter's bylaws should be changed to reflect these changes. Most often, these changes are voted on and approved at the RIMS Conference each year. In order to most accurately reflect these changes in your chapter's bylaws, make a point of having your board review your chapter's constitution and bylaws during the meeting following the conference. In areas that affect the chapters, RIMS constitution and bylaws would supersede in the event that the chapter's constitution and bylaws have not been updated to reflect the change(s). Example: Accepting Associates of the Society. A model [chapter constitution and bylaws template](#) is available online.

## **Insurance Coverage:**

RIMS chapters are provided with some insurance coverage through RIMS. For more information regarding your chapter's insurance coverage, a Summary of [RIMS Chapter Insurance Policies](#) is available online on the RIMS Web site.

Regional Conference cancellation coverage is also available through RIMS, but other event cancellation insurance is only available for a fee. You may contact RIMS at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org) for more information.

## **TAX ISSUES FOR U.S. CHAPTERS**

### **Tax Exemption:**

RIMS is a not-for-profit organization under Section 501(c) 6 of the Internal Revenue Code. This section affords RIMS tax exempt status. Unfortunately, RIMS chapters are not automatically tax exempt but must seek exemption by filing Form 1024 with the IRS. Many states require additional filings for tax exempt status, check with your state government about such requirements. In most cases, 501 (c) 6 organizations are obligated to pay state and local tax for purchases and services rendered, in the name of the chapter. RIMS and its chapters are not tax exempt. Check with your state/local tax departments if you have questions regarding local tax requirements.

### **Federal Tax Identification Number (SS-4):**

All chapters are required to obtain a Federal Tax Identification (I.D.) Number. This I.D. Number is used, for example, when opening a bank account and when filing tax returns. The form involved to obtain an I.D. Number is available from local IRS offices and is known as Form SS-4. A copy should be forwarded to the RIMS office.

If you are unable to locate your chapter I.D. number, check with your bank, as it is now required for all accounts.



## **Form 990:**

Form 990 - Return of Organization Exempt from Income Tax - must be filed with the IRS annually if your chapter's gross income exceeds \$25,000. In many cases chapters may be able to file Form 990EZ. For copies of the forms and complete instructions look on the IRS Web site [www.irs.gov](http://www.irs.gov). The deadline for filing, according to regulations, is "on or before the 15<sup>th</sup> day of the fifth month, following the close of the accounting period." If, for example, a chapter's fiscal year closes on December 31, the tax return is due on or before May 15. The form will typically be sent by the IRS to the address shown on the prior year's return. Return mailing instructions will be included.

## **Tax Payer Right to Know:**

Under current legislation, anyone has the right to request certain information and documents from a tax exempt organization. The exact rules on how quickly and in what format this must be supplied can be found on the IRS Web site at <http://www.irs.gov>.

## **Tax Record Keeping:**

The Treasurer or Secretary should have available copies of the following:

- The application for tax exemption, including all attachments.
- The IRS determination letter.
- The last 3 tax returns (Form 990 or 990 EZ) filed.  
(Note: Names and addresses of contributors may be omitted)

## **TAX ISSUES FOR CANADIAN CHAPTERS**

### **Revenue:**

Questions should be referred to a Problem Resolution Program Coordinator. You can find the telephone number under "Revenue Canada" in the Government of Canada section of the telephone book.

In order to qualify for tax exempt status, the terms an association must satisfy are the following requirements which are set forth in paragraph 149(1)(1) of the Income Tax Act:

- a. it must not, in the opinion of the Minister, be a charity;
- b. it must be organized exclusively for social welfare, civic improvement, pleasure, recreation or any other purpose except profit;
- c. it must in fact be operated exclusively for the same purpose in b. for which it was organized or for any of the other purposes mentioned in b.; and
- d. no part of its income may be paid, payable or otherwise made available for the personal benefit of any proprietor, member or shareholder, except in connection with the promotion of amateur athletics in Canada.



The organization will have to file the Non-Profit Organization (NPO) Information Return (Form T1044) even though it qualifies as an exempt organization if any of the following apply:

1. the organization received or is entitled to receive dividends, interest, rentals or royalties in the fiscal period totaling more than \$10,000;
2. the total assets of the organization were more than \$200,000 at the end of the immediately preceding fiscal period; or
3. such a return had to be filed for a preceding fiscal period.

An organization that has to file the Non-Profit Information Return may also have to file other returns such as the T2 Corporation Income Tax Return, the T2 short, or the T3 Trust Income Tax and Information Return. The T2 Corporation Income Tax Guide, and the T3 Guide and trust Return contain information to help you file your T2 or T3 return.

For information on how you may need to file see Interpretation Bulletin IT-83, Non-Profit Organizations - Taxation of Income from Property. A non-profit organization is not required to include financial statements with the NPO return. Your organization has to file its NPO information return, without receiving notice, within six months after the end of its fiscal period. Contact "Revenue Canada" for complete details and answers to questions.

## CHAPTER RECORD KEEPING, REPORTING, AND BUDGET GUIDELINES

### Record Keeping Guidelines:

The following is a list of items that your chapter might have, with suggested retention periods. It is suggested that you maintain a "history" file to be passed to your successors. This history will become an invaluable resource to future chapter leaders. Please note that state or local governments may have legal requirements regarding record retention.

Documents	Length of Time
Minutes of Board Meetings	Permanent
Constitution and Bylaws	Permanent
Approval of Federal ID Number	Permanent
Incorporation	Permanent
Application for Tax Exempt Status	Permanent
IRS Determination Letter	Permanent
Tax Returns (Support Information)	7 Years
Chapter Newsletters (If they provide Chapter's history)	Permanent
Chapter Activity Forms (Names,	3 Years

# Chapter Officers Handbook



Meeting Dates, Topics, Speakers)	
Regional Conference Records	1 Permanent Copy
Chapter Monthly Financial Reports	1 Year
Chapter Annual Financial Records (Bank Statements, Annual Financial Reports, Checks showing payment of Taxes)	7 Years
Officer/Committee records/reports	3 Years
Correspondence with RIMS office	1-3 Years
Canceled Checks	5 Years
Paid Invoices	5 Years
Meeting Receipts	3 Years
Photographs	Permanent

## Reporting Responsibilities:

Your chapter's treasurer is responsible for keeping your chapter, and particularly your chapter's board, informed of its financial status. This includes the following:

1. All receipts should be deposited promptly and recorded. Include source information.
2. All bills should be paid within a reasonable period of time. Significant or unusual expenses, such as printing or officers' travel, should be approved in advance by your chapter's board during the budget process or by your chapter's president.
3. Your chapter's Board should be given monthly reports of assets and liabilities (balance sheet) and change in net assets (called an income statement by for-profit companies).
4. Members of your chapter should be given the financial reports at least once a year.
5. Financial reports to your chapter's board should include any anticipated cash flow concerns or unusual activity.
6. Some chapters have significant cash resources. Your chapter's board should determine if these funds should be invested. It is best to have other board members work with the treasurer and determine the best approach. If there are investments, the results should also be reported regularly.

## Budget Planning Guidelines:

An annual budget will assist in planning your chapter's income and expenses. Financial requirements for various chapter projects must be estimated in order to establish a realistic budget based on anticipated income.

The following is a general set of guidelines for budget planning:

1. Start the planning process at your annual board retreat/planning meeting.
2. Review all existing programs and activities to assure they will continue.
3. Identify each new activity pursued by your chapter.



4. Each committee should complete their own activity worksheet(s) if there are budget dollars attached to the project. The worksheet should include a complete description of the activity.
5. All activity sheets should be submitted to the treasurer prior to the board retreat, so that a comprehensive budget can be created.
6. In the event you do not have a balanced budget, individual projects should be prioritized and voted on by the group at the retreat.
7. All anticipated expenses should be shown on the budget worksheet and should indicate what the monthly expenses are expected to be paid by your chapter. The same should be done for income.
8. An external auditor should reconcile your chapter's books annually.
9. Budgets can be done on an Excel Worksheet or put into an accounting software package.

## 7. RECOGNITION

Recognizing the contributions of your chapter officers, board, and committee members is extremely important to the long-term success of your board. Public recognition for people who are doing a great job communicates the value of their involvement. It serves as a thank you to the individual performing the service, as a way to recognize performance in front of peers, and as a motivator for others to become involved.

### Tips on how and when to recognize volunteers for their efforts:

- Publicly recognize and reward the contributions of volunteers at local chapter meetings.
- Have a “volunteer of the month” section of your chapter’s Web site and highlight the great job that one of your volunteers is doing for your group.
- Present a Past President Plaque each year. This plaque is available through RIMS at no cost to the chapter. For more information contact RIMS at [chapterservices@RIMS.org](mailto:chapterservices@RIMS.org).
- Send a letter to a volunteer’s supervisor to inform them of the good work they are doing for the chapter. These letters serve the dual purpose of rewarding volunteers and informing organizations about valuable chapter programs. Please note you should get the volunteer’s approval before sending this letter.
- Say “thank you” often and sincerely—volunteers are making your year successful. Celebrate progress and successes at board and chapter meetings.
- Use special name badges or ribbons at meetings to identify your board members and volunteers.
- When appropriate, present gifts of appreciation to volunteers for their hard work. Some great gift ideas are available at the RIMStore. Use RIMStore to purchase gifts for chapter officers, committee members, speakers, etc.
- Send the chapter’s outgoing president to the RIMS Conference as a gift from your chapter’s board.



- Recognize volunteers at each chapter event.
- Nominate a committed and talented volunteer for The Ron Judd Heart of RIMS Award. This award is given out each year at the RIMS Conference.
- Develop a Chapter Lifetime Achievement Award to celebrate long-term volunteer service.

## **RIMS AWARDS**

### **CHAPTER RECOGNITION PROGRAM AWARDS**

The Chapter Recognition Program (CRP) gives RIMS the opportunity to acknowledge the work and dedication of the chapters, as well as highlights outstanding chapter achievements. The accomplishments of the recognized chapters serve as examples, showcasing successes for other chapters to emulate.

Information regarding the CRP can be found on RIMS Web site at [www.RIMS.org/awards](http://www.RIMS.org/awards).

Awards are presented in several chapter size categories for the following:

- Outstanding Chapter Programming
- Advancing the Risk Management Profession
- Outstanding Member Services
- Overall Chapter Excellence

### **THE RON JUDD HEART OF RIMS AWARD**

Presented to an individual nominated by his/her chapter who best reflects the spirit of volunteerism, and recognizes the contributions and achievements of that special individual.

### **ARTHUR QUERN QUALITY**

Established jointly by RIMS and The Quality Insurance Congress, this award is presented to the individual, risk management department, company or specific product that personifies quality in risk management and has contributed to raising the quality bar.

### **HARRY AND DOROTHY GOODELL AWARD**

RIMS highest honor, the Goodell Award recognizes a lifetime of outstanding achievement in furthering the goals of risk management and RIMS. This award was established by Harry Goodell, the founder of RIMS and its president.

### **RICHARD W. BLAND MEMORIAL AWARD**

Presented by the President of RIMS at the annual RIMS conference, this award is given in memory of the Greater Kansas City Chapter's own Richard "Dick" W. Bland in recognition of outstanding performance and effort by a RIMS member in the area of legislation and/or regulation related to risk and insurance. The "Dick" Bland Award was conceived by the



Greater Kansas City Chapter, and the rules governing the award were written by Chapter members W. Hembree and C. Reid in collaboration with (then) A.S.I.M. President D. Barlow.

## **RIMSCANADA COUNCIL AWARDS**

### ***FRED H. BOSSONS AWARD***

This award honors Fred H. Bossons, who promoted risk management education while acting as RIMS Canadian Coordinator from 1984-1995. The award is presented annually at the RIMSCanada Conference to the person with the highest academic average in the Certificate in Risk Management (CRM) designation courses for the previous year.

### ***DON STUART AWARD***

Created by the Ontario Chapter of the Risk and Insurance Management Society (ORIMS), the Don Stuart Award recognizes outstanding contributions to the field of Risk Management in Canada by a Deputy, Alternate, Associate or an Emeritus Member of any of the Canadian Chapters of the Risk and Insurance Management Society (RIMS). The award is presented annually, or at the discretion of the board, by the president of ORIMS or his/her designate at the annual RIMSCanada Conference.

## **IV. Additional Resources**

Clearly, [www.RIMS.org](http://www.RIMS.org), will help chapter officers perform their tasks. Among the tools and resources not previously mentioned in this handbook are the following:

- **RIMS Chapter Document Templates**  
Stationery and regularly used templates for your chapter are available electronically in the Chapters section of the RIMS Web site. Models for individual awards, chapter stationery, newsletters and other documents are available online through [RIMS Chapter Stationery and Templates](#) page.
- **RIMS 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 e-mail based on these templates to members and/or prospective members using RIMS E-mail manager at [www.RIMS.org/emailchapter](http://www.RIMS.org/emailchapter). Please Note: By using the E-mail Manager to send out chapter notices, etc. you will be using the most up to date membership roster available through RIMS database. Additionally, templates can be shared among officers in a chapter.
- **Chapter Membership Reports**  
New members, expired members, expiring members, and other member reports are available through RIMS Web site at: [www.RIMS.org/memberreportschapters](http://www.RIMS.org/memberreportschapters). Your chapter membership committee



should run these reports once a month in order 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 have been made available to make this task much more manageable.

- **Tip Sheets**

In addition to the information listed above, RIMS has made a number of [tip sheets](#) for chapter officers available on line. These resources include Chapter Logo Guidelines, Insurance Summary, Position Descriptions, Chapter Web site Guidelines, tips on including Associates of the Society in your chapter, and a Board Member Orientation Tip Sheet. Handbooks, etc. You should familiarize yourself with these and the other resources available online.

- **Handbooks**

Beyond those already mentioned, there are a number of handbooks available to chapter officers. Visit the RIMS online [handbooks](#) page for more information.

- **RIMS Contact Manager**

[RIMS Contact Manager](#) allows chapter officers to input information about members and non members into the RIMS database. Further, it allows all contacts to be searched based on the characteristics they share with others. RIMS Contact Manager is a great tool for helping chapter officers recruit new members, retain old members and generally improve their effectiveness as administrators.

## CHAPTER TIPS E-MAILS

E-mails are sent out bi-monthly or as needed to give useful tips to chapter officers regarding their role on the chapter's board. E-mails include information on topics like Membership Development, planning, Chapter Recognition Program, etc.

## CHAPTER ADMINISTRATORS

Hiring a staff member for your chapter can help with the administrative tasks that often take up so much volunteer time, provide a resource who will know how your chapter "did things" in previous years, and allows chapter work to be performed consistently and professionally even through the transition of chapter officers.

Duties that could be delegated to administrative support include:

- Event registrations.
- Chapter newsletter.
- Chapter mailings and e-mails.
- Maintaining chapter mailing lists.

There are many ways to find administrative assistants. These include:

- Using an administrative services firm (check the yellow pages or ask for a referral from other nonprofit organizations).



- Using local affiliates of the American Society of Association Executives (ASAE).
- Referring to [ASAE's](#) listing of association management firms.
- Hiring a part-time person who would like to earn some extra money.
- Hiring a Student Member to help with the services.
- Hire an Affiliate Member to help with these services.

## **RIMS MEMBERSHIP AND 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).

## **V. Conclusion**

Thank you for taking on a volunteer role with your local chapter. As a RIMS chapter officer, you have the unique opportunity to be connected to RIMS not only as a member, but also as a volunteer and leader. You are directly affecting your local community by developing programs, education, and communications regarding the risk management profession.

Your involvement ensures that you will receive the most from your RIMS membership, while shaping your local risk management community in the process. We hope that the information in this handbook is a helpful resource and will make your new role easier, as well as give you the opportunity to fully enjoy your volunteer leadership position with RIMS.