

Chapter Programming Handbook

The Indispensable Guide to Successful Programming

Table of Contents

- I. Introduction (p. 2)
- II. Elements of Successful Programs (p. 3)
- III. Planning (p. 4)
- IV. Assessing your Chapter's Needs (p. 6)
- V. Finding the Best Program Topics (p. 7)
- VI. Speakers (p. 9)
- VII. Formats (p. 10)
- IIIX. Outreach and Marketing (p. 11)
- IX. Final Preparations (p. 13)
- X. During the Program (p. 15)
- XI. After the Program (p. 16)
- XII. Conclusion (p. 17)
- XII. Appendix
 - 1) Sample Annual Program Budget (p. 18)
 - 2) Sample Budget for One Program (p. 19)
 - 3) Pre-Retreat Questionnaire (p. 20)
 - 4) Program Planning Checklist (p. 21)
 - 5) Program Planning Timeline (p. 22)
 - 6) Pre-Program Survey (p. 24)
 - 7) Sample Meeting Notice (p. 26)
 - 8) Sample Press Release (p. 27)
 - 9) Sample Monthly Meeting Agenda (p. 28)
 - 10) Post-Meeting Evaluation Form (p. 29)
 - 11) Speaker Evaluation of Chapter (p. 30)



I. Introduction

This handbook serves as a chapter program director's guide. Its purpose is to help chapters deliver interesting educational programming. While the topic of how to run a successful meeting will be touched upon, this handbook has a more specific focus – how to deliver the interesting speakers, presentations, and activities that RIMS members value. This handbook lays out the resources RIMS has to offer and allows you to benefit from the experiences and strategies of other program directors.

Support

As the program director for your chapter, you have taken on a very important role. Timely and effective chapter programming is very important to the overall success of your chapter. It creates interest in your chapter and makes recruitment and retention of members easier. But achieving successful programming is not your job alone. Because of the job's importance and multifaceted nature, your chapter's board and membership should be willing to assist you with the many tasks associated with developing solid programming. Many chapters employ an administrative assistant, association management service, and/or utilize a committee to support the program director. Depending on your chapter's size and the number of programs per year, you may also wish to take this approach.

The appendix of this handbook contains many sample checklists, forms and planning documents that have been helpful to other program directors. We encourage you to use them, incorporate their concepts, or develop a system that works for your chapter. Many different approaches have been used to achieve excellent results.

The Program Director

Different chapters use different strategies when planning and administering programs. However, there are some basic tasks program directors should fulfill. These include:

- Developing programs for the year that enhance the Risk Management profession
- Working with others to administer and promote events
- Attending all meetings and programs
- Enhancing and improving educational seminars and chapter meetings
- Investigating "partnering" educational opportunities with other organizations
- Conducting an annual call for presentations
- Obtaining continuing education credits for meetings
- Providing on site assistance

Realizing these goals requires a personality that is both outgoing and organized. Program planning is but one aspect of the job. During a program, the program director is much like a host. He or she will engage members in conversation, facilitate connections and make guests feel comfortable. A successful program director will need to dedicate approximately six hours per month to his or her duties.

You, your chapter and your employer will benefit from your service as program director. You will gain experience, improve meeting management skills, expand your professional contact network, and learn how to better coordinate presentations. The programming you provide will help increase meeting attendance and assist in recruiting new members. You will know you are successful when your chapter is excitedly looking forward to the presentations you have organized.

II. Elements of Successful Programs

All good chapter programs have three things in common.

1. Value: Members should leave a program feeling that they are better risk managers, or that they now have more resources at their disposal. This goal should be met whether your programs' purpose is informative or social. When planning a program, identify the value sources. Will it come from the information provided, new contacts met, or perhaps through better understanding of the support offered by RIMS?

The best programs provide value in multiple ways. Obviously, excellent speakers can help you deliver a great program. But did you know that most members identify networking as their top reason for joining RIMS? It is important to allow time for social interaction during the meeting. Good programming recognizes the value of networking, and boosts enthusiasm and participation in other chapter activities. The typical well-conceived chapter meeting will include time for conducting routine chapter business, provide education, and allow for members to get to know each other.

One way to assure value in a program is to have it meet continuing education standards. Find out from your members what their needs are. U.S. chapter officers should then contact the state or insurance commissioner's office to find out how your chapter can become a provider. Canadian and officers of chapters outside the U.S. should contact their national insurance regulators.

2. Timeliness: Keeping abreast of the latest developments in risk management is one of the primary reasons companies value their RIMS membership. The program director is responsible for introducing new

ideas in risk management to the chapter, including new opportunities, products and controversies.

3. Interest: We have all sat through PowerPoint presentations and lectures where the clock seems to stand still. Even when a topic is first-rate, a monotone, acronym-filled presentation will leave your members wondering why they came. Membership in RIMS should be professionally rewarding and personally enjoyable. Ideally, so should every program.

III. Planning

Involving your Board of Directors

It is important to involve the board throughout the planning process. Chapter programming is vital to membership recruiting and retention. The program director should understand the board's direction at the outset and then get board approval of all final plans.

Your first jobs as program director are to find out what your goals are and what you have to work with. You likely assumed the job at the same time as a new board was installed. Everyone may be starting fresh, and traditional approaches may be changed or abandoned altogether. At the earliest opportunity, get your board to give you firm answers to the following questions.

- 1) How many presentations will be needed for the year?
- 2) Does the board of directors believe certain topics must be covered during this year's programming?
- 3) What is the programming budget?
- 4) Where and when are meetings going to be held in the coming year?

Budgeting

Understanding your chapter's programming budget allows you to dedicate programming funds wisely. Work with your chapter treasurer to ensure a minimum of surprises. You and the treasurer should keep in mind that popular events and speakers can bring money into your chapter's coffers.

Utilize the treasurer's input as you develop two kinds of budget documents:

Annual Budget: The big picture budget document is relatively straightforward and easy to use. Your chapter budget documents should show clear linkages to your planning documents. Fund amounts should stay consistent. A sample annual budget is provided in the appendix and can be altered to fit your needs. However, you may wish to create linked spreadsheets to keep dollar totals consistent.

Individual Program Budget: An individual program budget makes it easy to estimate expenses and revenue and then compare them with actual figures. Your treasurer will likely take interest in such documentation. A Sample Budget for one program is included in the appendix. Feel free to place this model in a spreadsheet for ease of use.

Planning Meetings & Retreats

Your chapter's board of directors will likely be interested in the chapter's annual program of events. Many chapters make a special effort to assure the best possible programming by engaging in a special planning meeting, possibly during a chapter leadership retreat. Be prepared at such a meeting. If possible, bring revenue and expense information and the results of a survey that outlines the programming needs of your members. A planning meeting may be an opportunity to review your draft calendar of events or provide you with enough board guidance to complete it. Use the Pre-Retreat Questionnaire and/or the Program Planning Checklist in the Appendix to help prepare for such a meeting.

Calendar of Events

Input from the board of directors, feedback from chapter members, and your own analysis should be considered when preparing your draft calendar of events. Work with your chapter treasurer to include budget estimates and be ready to provide a rationale regarding the need for all events. Upon its completion, this summary of your plans should receive a final review by the board.

It is a good idea to allow for flexibility in your calendar. You may want to finalize topics or speakers for the end of the year at a later date, or leave room for a topic that may be hot at that time. On the other hand, some programs, such as PERK sessions (which will be described later in this handbook) generally require six to nine months from request to presentation. It is important to get PERK requests in at the beginning of the calendar-making cycle. There are many different approaches to determining a calendar of events. Find one that works for you, your membership, and your chapter's board of directors.

Individual Program Planning Steps

There are many steps in assuring a program's success. Planning for each program often begins many months in advance. Effective program planning lays out milestones to be checked off well in advance of the program date. In abbreviated form, these are:

- 1) **Determine Programming Budget:** Find out how much money you can devote to all programs (should be done annually). Be sure you know your chapter's fiscal calendar.
- 2) **Analyze Chapter Programming Needs:** Survey members to find out what they want to know more about. Do your own research to determine

- what topics you think they will need to know about (should be done at least annually).
- 3) **Select a Program Concept:** Decide upon a topic, speaker, format and date. This may take some juggling and flexibility.
 - 4) **Complete Individual Budget:** Use a budgeting sheet to make realistic estimates of what the program you envision will cost. Work with your chapter treasurer to ensure funds will be available should you need them.
 - 5) **Obtain Board Approval:** The board may not want to approve every program you suggest. Regardless, you should know you have authority to plan and execute approved programs.
 - 6) **Confirm Program:** After approval is received, invite the speaker and make all other initial arrangements. Follow up on your conversation and these arrangements in writing.
 - 7) **Develop Lists:** Of course you want your membership to attend, but you may also like prospective members to come to your meeting. Programs are one of your chapter's best recruiting opportunities. Identify prospects and work with other organizations to build lists.
 - 8) **Marketing:** Promote, promote, promote! Use whatever media you have at your disposal. Send announcement e-mails and work with your chapter Webmaster to keep a Web-based events calendar current. If you need help using the e-mail manager on RIMS Web site call the Membership and Chapter Services Department at 212-655-6041.
 - 9) **Confirmation Calls:** Check in with your speaker and vendors as the day approaches. Thank them for their help and be prepared to make adjustments.
 - 10) **Day of Event Planning:** Review your introduction and goals for the event. Show up at the site a little early to make sure everything is in place.
 - 11) **Say "Thanks":** At the conclusion of the meeting be sure to follow up with a thank you gift or note.

These eleven steps are abbreviated. A more detailed Program Planning Timeline is available in the Appendix.

IV. Assessing your Chapter's Needs

Personal Approach

Your members will determine if your programs have value, and the best way to gain their insight is through personal contact. As program director, you should be building relationships with your chapter's membership so you can better understand their needs. Solid relationships will pay off in solid programming and the willingness of members to help you.

Surveys

The most effective way to assess member needs is to conduct a survey. A survey can be done using several formats. Regardless of format, decide what you need to know before you begin and get right to the point. If you ask members to pick from among topics, be sure to allow them the opportunity to suggest topics as well. Put a personal face on what can be an impersonal form of communication by sharing the results at a chapter meeting and personally thanking participants. A sample pre-program survey is available in the Appendix.

Successful surveys can be conducted in a number of ways:

Paper: Mailings are no longer recommended as a good option due to the expense relative to other forms of communication. If you prefer conducting surveys on paper, simply hand them out and collect them at a chapter event.

Telephone: Phone surveys take more time and effort than other formats, but they can deliver the best results. Beyond delivering the necessary data, telephone surveys allow for personal contact and networking, which will be helpful in the future.

Web: RIMS Chapter Web site software includes an online survey tool that includes reporting and access-restriction capabilities. Your chapter Webmaster can assist you in putting together an online survey. If you would like to set up an online survey, look over the [Webmaster Handbook](#) for basic instructions. Work with your Webmaster to initialize the survey. Should you need additional support, contact RIMS Membership and Chapter Services Department at chapterservices@RIMS.org or 212-655-6041.

E-mail: An e-mail survey is an easy way to request answers to questions. E-mail can also be used in a more sophisticated way by including a link to a Web-based survey. If you need assistance using the E-mail Manager tool on RIMS Web site, contact RIMS Membership and Chapter Services Department at chapterservices@RIMS.org or 212-655-6041.

V. Finding the Best Program Topics

Member surveys are necessary. But they are not the only step a program director needs to take before going to the board with recommendations on a programming agenda for the year. There are risk management issues coming “down the pike” of which your members do not yet know. It is your responsibility to assess the “cutting edge” of the profession and introduce new issues. Programming should respond to member demand with an eye on topics that are likely to be of interest in the near future.

Look Locally

There are local risk management issues specific to your area as well as international risk management issues your chapter can focus on. Local resources and personnel are almost certainly dedicated to both of these challenges. First, look to your chapter members' expertise. Your area is likely to have speakers waiting to give informative presentations to your chapter – but you may have to look slightly out of the box to find them. Local and state police, meteorologists, college professors, statisticians and others can provide valuable insights for your chapter's members.

Partnering with Other Organizations

RIMS maintains excellent relationships with many professional organizations. Chapters have often benefited from these relationships by hosting joint programs with the CPCU Society, SHRM and other organizations. If you are interested in co-hosting a program with another organization, be proactive and contact their local chapter. Contact the local chapter of the ASSE; PRIMA; or state or provincial bar association.

RIMS Resources

RIMS provides program managers with countless resources for inspiration:

RIMS Members and Chapters: RIMS greatest assets are its members and the knowledge they hold. Attendance at such events as the Annual and Regional Conferences help you develop a network of risk management professionals from around the world. Get in touch with members from other chapters to see what programs they have found valuable. Visit the Web sites of other chapters to see what program topics they are focusing on.

E-Groups Take part in discussions among different segments of the risk management profession through E-Groups. Even if you have not had the opportunity to meet many of your fellow program directors, postings to the Chapter Officers E-Group are reviewed daily by hundreds of chapter officers. All chapter officers are automatically subscribed to this E-Group. In addition, the Risk Professionals E-Group and other more specific E-Groups can provide you with an idea of what the hot topics are for today's risk managers.

RIMS Annual Conference Sessions: Review the topics selected for inclusion in this or last year's [Annual Conference](#). At the conference, approach speakers to ask for ideas as to how their messages could be reformatted for a smaller venue.

Risk Management Magazine: RIMS publishes the leading journal for the risk management profession. The articles it contains are insightful and timely looks at the large trends and issues in risk management. Review past issues and visit the magazine's Web site to review the [editorial calendar](#), which provides glimpses into upcoming issues.

RiskWire: The newspapers and other media outlets are filled with more risk management and insurance stories than ever. All of these come to the inbox of RIMS members through [RiskWire](#), RIMS automated risk and insurance news clipping service. Stay attuned to risk management news to pick topics and even speakers from the media.

PERK Program: RIMS brings knowledge leaders to chapter meetings through a unique partnership: the Professional Exchange of Risk Knowledge (PERK) Program. PERK delivers free quality programming while facilitating membership development and enhancing networking opportunities. There is perhaps no easier way for busy chapter leaders to arrange timely, insightful presentations. For more information go to <http://www.RIMS.org/PERK>.

Speaker's Bureau: RIMS allows speakers on risk management related topics of all kinds to join its [Speaker's Bureau](#) available on RIMS Web site. This online index of presenters can be searched by subject, geographical area, company, and ratings of past performance. When you encounter terrific speakers encourage them to add themselves to this valuable resource.

VI. Speakers

Occasionally, a poor speaker will be able to hold an audience's attention simply by providing information on a topic of great interest. However, it is much more common for a poor presenter to reduce the impact of an important topic.

Of course, program directors need to find speakers who are knowledgeable, engaging and, if possible, entertaining. Consider the following to assure a good speaker:

Gravitas: You have selected a topic the chapter needs to know more about – now get a person your chapter wants to hear from. If possible, pick someone who is an authority on the subject, who is an authority on multiple other topics, and of whom a percentage of your chapter membership already knows. A key question: if the topic were unknown, would your members want to hear from this person?

Leadership: Proven leaders often make good speakers. Most know how

to communicate, hold an audience's attention, and have achieved a position of respect. Governmental, law-enforcement, business and non-profit leaders are often able to make effective presentations and adapt their communication styles to your program's needs.

Respect by Association: Even if a potential speaker's name is not well known, the prominence of their organization can get your chapter membership excited. Regardless of the topic, the ability to hear and meet the regional FBI or FEMA head can bring in a crowd, for example.

Speaking Experience: Has the person spoken on this topic before? Is speaking to an audience of the size you anticipate something they have done previously? Feel free to ask before inviting them to speak.

Recommendations: What have others thought about presentations by this individual? Review sources of information on past performance or ask for references.

Connections: Try to find someone your chapter membership would want to know for professional reasons. Is their network valuable to your chapter members?

Web Search Engine: Put the speaker's name and employer in Yahoo's or Google's search engine and see what results come back. The results may help you assess your potential speaker's background, level of expertise, speaking experience and professional gravitas. Also, try a search of the person's name and the topic on which you want them to present.

When you know whom you want to speak to your chapter, call them with an invitation. Six to nine months in advance is not too far. In fact, the more desired the speakers the quicker their calendars fill. Do not be surprised if a potential speaker agrees but needs over half a year to find a mutually convenient date.

VII. Formats

There is more than one way to deliver education at your monthly meetings. Make sure you keep things interesting by varying your formats. Interaction keeps things lively, gets a "buzz" going and improves your attendance. Save the "One Speaker, One Topic" format for a very special speaker with a "hot topic."

- **Round Table:** Topics discussed in rounds with moderators at each table.
- **Panel:** Three or more speakers on a topic.



- **Workshop:** Hands-on activities (great for half-day events).
- **Debate:** Two sides of an issue.
- **Field Trip:** Visit a company site for their risk manager's perspective.
- **Mock Trial:** Call on local attorneys to make the presentation.
- **Game:** Copy the format of a popular game show.
- **Competition:** Put risk managers and brokers on opposing teams.
- **Skit:** Followed by a discussion, "How this could have been avoided."

Regardless of the format, your chapter event should begin with a concise summary of current chapter business. Take the first five minutes of the meeting to bring everyone up to date with such routine matters as future meeting dates, chapter expenditures and fundraising goals. Be sure to mention any chapter news that guests and non-members will find impressive. Introduce new members and any VIPs that may be visiting your chapter.

VIII. Outreach and Marketing

Internal Promotion

There are many ways to promote your upcoming programs. Your best bet is to promote intensively to your members (internal promotion) in a variety of ways. Create meeting notices highlighting basic information on the speaker, including name, title, topic of presentation, and a few sentences explaining why this presentation will be useful. Send out these meeting notices by e-mail, mail, post them on your Web site, and place on each table during your meetings.

In order to keep your attendance up, you need to transmit your excitement about upcoming events to your members in every way possible. Don't forget about word of mouth! Start promoting early and keep at it. Put announcements into your agenda and promote during "new business."

The following tools on RIMS Web site are especially helpful for internal promotion.

E-Mail Manager: Allows you to send blast e-mail to highly targeted groups, including members. Fields in the E-Mail Manager allow you to select exactly the people you want to contact. The search fields can also be used to download sophisticated reports into Excel.

Membership Reports: Similar to E-Mail Manager in its reporting capability, Membership Reports contains fewer fields for ease of use.

E-Mail Templates: Develop professional html-based e-mail through the E-Mail Templates link. Your e-mail can include pictures, color, and different fonts to grab the attention of your recipients.

Contact Manager A tool designed to make chapter management, recruiting and marketing easier, Contact Manager allows you to combine your chapter's contact lists with RIMS contacts for comprehensive list development.

RIMS Online Calendar of Events: The easiest way for you to track registrations for upcoming events is through the RIMS Calendar of Events. Allow for online registration and then send a link to the calendar registration in your promotional e-mail. You can view a list of those registering for your event through Chapter Meeting Reports.

If you have questions as to how to use these tools, contact the RIMS Membership and Chapter Services Department at chapterservices@RIMS.org or 212-55-6041.

Whether preparing Web-based e-mail or paper promotions, you can use the Sample Meeting Notice and Sample Newsletter Announcement in the Appendix to help prepare your marketing documents. These are also available online at <http://www.RIMS.org/chapterstationery>.

External Promotion

You've taken the time to reach out to your own members. Now is the time to think big and reach out to the rest of the business community, the press and local politicians who may look to your chapter for risk management advice. Promoting RIMS enhances the reputation of the Society and your chapter, improving the profession overall and boosting your career.

Send out press releases to the business editor of your local newspaper to announce upcoming meetings and events. Even a fundraising golf tournament is news on slow day. You never know when you might find your chapter's charity event covered on the local channel's six o'clock news!

Local print media needs press releases three weeks in advance. A follow-up phone should be made the week of the event. Local broadcast media needs two weeks of lead-time with a phone call the week of the event. Risk Management Magazine (Datebook section) requires three months advance notice. RIMSCOPE and the RIMS Canada Newsletter are association-wide and need to

be advised two months in advance. Elected officials require as much notice as it is possible to give.

Review the draft press release in the appendix before drafting materials to promote your events. For assistance you can contact RIMS Public Relations Associate at 212-655-6059 or by e-mail at pr@RIMS.org.

IX. Final Preparation

There are a few things that need to be done as the date of your program approaches. In the final weeks leading up to your program: call the vendors, special guests and speakers to be sure their plans and yours are the same; execute the final marketing push; and finalize the agenda.

Preparing the Program Agenda

Now that your speaker and format have been selected it is time to prepare the agenda. The agenda can be distributed to all attendees or held privately. Regardless, its purpose is to serve as a general guideline for how the meeting is structured and how time is to be allocated. Rigid adherence to the agenda may, occasionally, cut-short meaningful exchanges. However, most professionals live by their watches, and appreciate it when meetings begin and end on time. Use the sample monthly meeting agenda in the Appendix when designing your own chapter 's meeting agendas.

Chapter Readiness

The day of the program is your day to shine, but it is also an opportunity for the chapter to showcase itself and achieve its goals. The following chapter officers should know, before the meeting, what is expected of them:

President: Should be introduced to the important non-members. The more background you can give him or her the more seamless the conversations will be. The president often takes on other vital roles, such as emcee. Make sure he or she has all they need to make the introduction of the speaker.

Treasurer: Should have a system in place to collect and account for registration fees and other financial transactions.

Membership Director: Needs to play an active role – be sure he or she has a list of the non-members who will be attending. Also make sure there are membership applications and recruitment materials on hand.

Webmaster: The Web site should promote the event before it is held and proclaim its importance afterwards. Post information about the event (including a copy of the remarks, if possible) soon after its conclusion.

Communications / Public Relations Officer: Should be at the event with enough press releases and a list of invited media with reporters' names to facilitate good coverage.

Newsletter Editor: Should have copies of the press release and be ready to give details of the program in the chapter newsletter.

Volunteers

Most meetings have specific roles perfect for a willing volunteer. It is best to line up help before the day of the meeting. Ask for help at the previous chapter event or call other members beforehand to make the day run as smooth as possible.

Greeter: Every chapter should have a welcoming committee and/or a greeter. Your greeter can be a former president, a retiree or anyone wanting to connect with the membership. All a greeter needs is some enthusiasm and friendliness.

Moderator: A successful meeting needs a moderator (usually the chapter president) to keep track of time, especially if you have more than one speaker. A moderator also helps steer conversations back to the topic if they stray too long in another direction. Have questions ready for the speaker if the audience has none.

Speaker: A speaker's role is to be prepared, stay on target and focused on the topic, to emphasize relevant experience and to answer questions. Encourage the speaker to share stories, and share enthusiasm while avoiding lecturing and the controversial.

The Etceteras

Upon becoming the program director you were likely given a box of things necessary for holding a meeting. Maybe these included ribbons, pins, banners, and/or name tags. Be sure to have all these things ready before the event. Why not put them in your car or office the night before?

It is always a good idea to use customized nametags for every event. They facilitate introductions and allow people to get more comfortable in new surroundings. Basic information includes name, title and company name, but there are simple ways to make them foster event effectiveness.

Guests should have nametags that allow members to see that they are new to a chapter event. Members can then go out of their way to greet someone who probably does not know anyone in the room. Guests attending a chapter event are your highest-probability new members. Some chapters use specially colored nametags, or stickers to highlight guests to the chapter. However you do it, make sure visitors to the chapter are easily recognized and approached often.

Many chapters use nametags with specially colored ribbons to denote leadership positions. Many people are uncomfortable in situations where they don't know anyone. Guests and potential recruits are more likely to approach someone for more information or to comment on the event if they believe they are speaking to an appropriate person. Badges highlighting a leadership position make it easier for guests to identify people to approach. RIMS has colored nametag ribbons available for specific chapter officers. Contact the Membership and Chapter Services Department at 212-655-6041 or chapterservices@RIMS.org to request them.

X. During the Program

Meeting Management

The best way to manage your meeting is to think like a risk manager and prepare for all possible contingencies. Show up early and walk through the site. Make sure the room is set up properly, and that the AV equipment is working properly. The registration table should be set up outside the meeting room with badges in alphabetical order. The membership table should be staffed by a friendly person and filled with brochures and applications. A RIMS literature table can also be set up inside the room.

Soon, people will be coming through the doors. Prepare your other chapter officers as they arrive, greet the guests, meet the speakers and delegate to your volunteers. Mingle while you keep an eye on your agenda. The day of the program can be hectic, but do your best to accomplish the following:

Facilitating Relationships

You should have a good grasp of who is a member and who is not. Introduce yourself to non-member guests and facilitate other introductions to members. You are too busy to have an extended conversation with one guest, but facilitating conversation and mingling is one of your main responsibilities.

Social Introductions

By the day of the program, you have probably noticed natural pairings of guests, speakers and/or members who should be introduced. Perhaps your main guest needs to meet the chapter president, or a guest risk manager would benefit from meeting a member in the same industry. You should facilitate these relationships. Your speakers and important guests should be told to ask for you. When they approach, greet them warmly before saying "there is someone I think you would be interested in meeting," then make that key introduction.

Handling Key Guests

When your speaker or other key guests arrive, a friendly member should serve as their "introductory escort" around the chapter. Your members likely came to meet this influential people. You must not leave these people alone and hope

that members notice their nametags. You or a designated person should put them in circulation.

Program Introductions

When it is time for the formal program to begin, the introduction should be friendly, warm, and, if possible, humorous. At the very least, the introduction should have three specific pieces:

Biographical Information: Tell the audience why this person is worth hearing. Modest detail, focusing on recent accomplishments, is usually necessary. (A more detailed bio can be on the event program.) Two to three sentences will suffice. This information can be on an index card for easy reference. Do not read an entire biography.

Proper Pronunciation: This is an absolute must. Few things show lack of regard more than casual mispronunciation. Unless the name is common, have the name spelled out phonetically on an index card.

Thanks: The speaker is doing everyone a favor by appearing. Make sure he or she knows how much it is appreciated. Lead a round of applause after the announcing of the speaker's name and before the handshake.

XI. After the Program

Upon the conclusion of the program there are only a handful of tasks to tend to.

Thanking the Speaker

Do you have an attitude of gratitude? Take the time to give a gift or make a charitable donation in your speaker's name to thank them for taking the time to provide quality programming to your members. You can order a gift with the RIMS logo on it from the [RIMSTORE](#) on the RIMS Web site. Or present something characteristic of your geographical region. If your speaker is not local, present something that packs away easily.

Evaluations and Feedback

There is no way to know how well a program is received unless you ask your attendees for their opinions. The easiest way to gain immediate feedback is through an evaluation form at the end of the event. Put the form in front of attendees at the close of the program for the highest return rate. The sample post meeting evaluation form in the Appendix is a good guide for your chapter's evaluation forms.

Also in the Appendix is a speaker evaluation form. Your chapter wants to engender good feelings among its guests. Letting your speaker evaluate you

and your facilities is a good way to be sure you are meeting the needs of the speakers you want to attract.

Record Keeping

It is very important to keep track of speakers and program dates. Keep a written record of who spoke, when they spoke, and how they were received. Since your leadership changes, you need to keep records (simple ones) like a one page summary sheet with your impressions and the feedback from your members. Create a binder for this archive of your programs. Some chapters have a board position called “chapter historian” who handles this task, though often it is a part of the secretary’s duties.

Also, go back to your original programming timeline and adjust the document with the actual amount of time it took to accomplish tasks. In this way, you will be preparing your successor for the task ahead of them in the upcoming term.

Succession Planning

Once you have developed a system that works for you, make sure you pass it on to your successors. Remember how much time it took for you to learn your job as a program planner and make an effort to pass on as much as you know to whoever takes over when your term is over. Everyone benefits.

XII. Conclusion

Strong, interesting programming is vital to the health of your RIMS chapter. It is key to meeting the needs of chapter members, keeping the community interested in that your chapter is doing, and recruiting new members. There are many different approaches to providing it, but all involve planning and support.

Use the information and guidance provided here and contact the Membership and Chapter Services Department at chapterservices@RIMS.org

APPENDIX 2: Sample Budget for One Program

Program Title: _____ Program Date: _____ Program Time: _____ Program Location: _____ Program Planner: _____

Expenses	Quantity	Cost per Item	Budget	Actual
Audio Visual Equipment				
list your equipment			\$0.00	
Facilities - room rental			\$0.00	
Food and Beverage			\$0.00	
Breakfast			\$0.00	
Lunch			\$0.00	
Dinner			\$0.00	
Breaks			\$0.00	
Postage			\$0.00	
Promotional Printing			\$0.00	
Chapter Administration			\$0.00	
Speaker Expenses			\$0.00	
Hotel			\$0.00	
Meals			\$0.00	
Travel			\$0.00	
Speaker Fee			\$0.00	
Supplies			\$0.00	
tent cards			\$0.00	
name tags			\$0.00	
			TOTAL EXPENSES	\$0.00

Revenues	Quantity	Cost per Item	Budget	Actual
Member Fees			\$0.00	
Non-Member Fees			\$0.00	
Other Fees			\$0.00	
Total Attendees	0		\$0.00	\$0.00
Sponsorship Fees			\$0.00	
list each sponsor			\$0.00	
Total Sponsors	0		\$0.00	\$0.00
			TOTAL REVENUE	\$0.00
				NET PROFIT

Date prepared _____



APPENDIX 3: Pre-Retreat Questionnaire

- 1) What goals do you want to be addressed at this retreat:
- 1)
 - 2)
 - 3)
 - 4)
 - 5)

2) Please rank the following proposed retreat topics in order of importance. (1 being most important to address at this time):

- Board, relationships, and communications
- Board's role in fund-raising
- Structure and frequency of Board meetings
- Chapter Budget
- Calendar of programs
- Community issues facing the chapter and Board
- Updating the Chapter's Constitution & Bylaws
- Changing needs of our constituents
- Membership growth
- Membership retention
- Other: _____

3) Please rank the following proposed locations in order of your preference with 1 being your first choice:

- Hotel Downtown
- Golf Club
- University Conference Center
- Lodge at a State Park
- Member Company's Board Room
- Member's Home
- Other: _____

4) Please rank the proposed times (1 being the most convenient for you, 3 being the least convenient):

- Friday Night and Saturday
- Saturday and Sunday
- Weekdays with overnight; best day(s)

5) Please provide us with your other suggestions for this year's retreat.

6) What are the 3-5 major issues facing our chapter in the next five years?

7) What are the 3-5 major issues facing our chapter board in the next five years?

8) What are some suggestions for ways that we can better serve our members?

(In order to prepare the most effective agenda for our upcoming retreat, we need to hear from you. Please return this form to us by (date) to (name) at (e-mail address). If you have any questions please contact (name) at (number) or (email address).

Thank you for helping us make our chapter a success!

APPENDIX 4: Program Planning Checklist

In order to get ready for your planning meeting you may want to consider the sample program planning meeting checklist to prepare for the meeting.

Chapter and Member Needs

- Member survey
 - Phone
 - Chapter Officer E-group
 - Risk Professional E-Group
 - Mail
 - Fax, E-mail
 - Newsletter
 - Chapter meetings

Budget

- Review previous budgets for meetings –
 - Are cost savings available?
 - What costs have increased?
- Current sources of income
 - Meeting/Program fees
 - Chapter Dues
- Sources of additional revenue/support
 - Sponsorship
 - Fundraising
 - Hold meetings in member's offices – associate members are often willing to do this – good PR for their company

Previous Meetings

- Review the topics
- Were they well attended?
- Review the evaluation forms

Types of Meetings – schedule different delivery methods

- One person/one topic
- Debate
- Panel Discussion
- Round Table
- Workshop
- Field Trip / Site Visit

Plan Your Annual Calendar

- Plan the topic and type of meeting you would like each month
 - Perform a survey to determine what your members want, not what you want
- Use a program planning committee and make a chapter Meeting Planner responsible for
 - Setting speaker, location, promotion and meeting management
 - Making sure everyone is comfortable with assigned roles
 - Gathering input on the Program Planning Timeline with all Chapter Meeting Planners

APPENDIX 5 – Program Planning Timeline

Program Topic:			Date/Time		
Completed	Target Date	Time Period	Activity to be Completed	Person Responsible	Notes:
			Budget Completed	Treasurer	
		3 to 6 months ahead	Perform a needs analysis		
			Select a topic		
			Create list of potential speakers		
			Contact potential speakers		
			Select a date - depends on location and availability of speakers		
			Select and reserve location Check costs for food and a/v		
			Confirm Speaker - in writing		
		At least 8 weeks before	Check target list for updates and Prepare mailing labels		
			2nd Notification - Write, proof and distribute flyer, invitation, newsletter, press release, notice on website and other promotional materials		
			Plan and write meeting agenda		
			Announce program at monthly meetings		
		At least 4 weeks before	Check target list for updates and Prepare mailing labels		
			2nd Notification – Write, proof and distribute flyer, invitation, newsletter, press release, notice on website and other promotional materials		
			Announce program at monthly meetings		
			Include in newsletter		

Chapter Programming Handbook

The Indispensable Guide for Successful Programming

			Plan your introduction of speaker		
			Remind speaker you'll need handouts at least 10 days before		
			Order food, beverages		
			Order a/v equipment		
			Assign board and committee members 5 - 10 people to call to promote the Event		
		At least 1 week before	Assess the number of registrants - Too few - need to promote the event Too many - may need a bigger room, more handouts.		
			Create a roster		
			Make name tags/table tents		
			Do a blast e-mail or fax broadcast promoting the event.		
			Practice Speaker Introduction and information you will need to tell the audience		
			Gather supplies, materials, copies of speakers' handouts		
		Night before (if possible) or 1 hour before	Set up and test a/v equipment - MANDATORY - Don't assume it will work.		
			Set-up materials		
			Check the room set up		
		At the Program	Collect money for on-site registrants		
			Use roster as attendance sheet		
			Have your committee members speak with new attendees		
			Distribute and collect the evaluations		
		After the Program	Tabulate the evaluations and send summary to speaker		
			Send thank you to speaker		
			Update your database		

APPENDIX 6: Pre-Program Survey

Thank you for participating in this survey. Your responses will help determine program topics and formats for the coming year. Please take a few minutes and answer every question to the best of your ability.

- Name, Chapter Office (leave blank if necessary): _____
- Company Name: _____
- Chapter Board Position (if applicable): _____
- Do you regularly attend the Chapter's monthly meetings? Yes No (please circle)
- If no, why not? _____
- Are you more interested in the speaker or the topic? Please explain.

- Does the chapter provide you with enough information about the speaker and topic for you to make an informed decision on attending the meeting? Please explain:

- Please check which topics are of interest to you:
____ Enterprise Risk Management
____ Information Systems
____ TRIA / Legislative Issues
____ Environmental Liability & Global Warming
____ Managed Care / Employee Benefits
____ Benchmarking
____ Corporate Governance
____ Captives
____ Improving your Worth as a Risk Manager
____ Workplace Safety
____ Terrorism
____ Other
- What issues are your own organization or department dealing with? Would like more information on these?

- Would you attend a closed session "for risk managers only" during the program year? Yes No
Please check the kind of social events you are interested in attending
____ Golf
____ Holiday Party
____ Tennis
____ Billiards
____ Wine Tasting
____ Fun Run
____ Other _____, _____, _____
____ None

Chapter Programming Handbook

The Indispensable Guide for Successful Programming

- How many years have you been a risk manager? _____
- Do you feel that our programs are appropriate to your level? Yes No
- Would you consider taking part in an annual strategic planning retreat ? Yes No
- If yes, what locations would be of interest to you?

- What could your chapter leaders do to affect your involvement or attendance at monthly meetings?

- What is your personal area of expertise at your current job? _____
- Would you be willing to make a presentation about it during a chapter meeting? Yes No
- Do you have any suggestions to improve our Chapter meetings? Please explain.

- We have need for volunteers for very small jobs. Please indicate the total number of hours you might be willing to pitch in on a short-term project:
____ 2 hours ____ 5 hours ____ 7 hours ____ 10 hours ____ more
- Please indicate your meeting preferences:
Days of week: _____, _____, _____
Times: _____, _____, _____
Locations: _____, _____, _____
Additional comments:

Thank you for your participation.



APPENDIX 7: Sample Meeting Notice



**Chapter
Logo**

Title of Program

Date

Time

Place

Benefits of attending the meeting: (one to two paragraphs)

Type of Meeting (if different or unique, list meeting format):

Speakers (with brief biographical paragraphs and pictures if possible):

For more information, contact: _____

RSVP* date: _____

* You will be charged if you RSVP "yes" and do not appear.

APPENDIX 8: Sample Press Release



Chapter
Logo

[Fill in appropriate data in the blanks and within the parentheses.]

FOR IMMEDIATE RELEASE
CONTACT: (Name), (Telephone)

On (day of week), (date), at (time), the _____ Chapter of the Risk and Insurance Management Society, Inc. will present (title) at (venue), (address).

The speaker, (name), (title), at (name of company) is an expert on (subject matter). He/she has (years) of experience in (field). Prior to joining (current employer, (Mr./Mrs./Ms. name) worked for (former employer) where (he/she) (experience/notable accomplishment).

The public and press (is/is not) welcome to attend. Admission is (\$) for RIMS members and (\$) for non-members. For more information or to make a reservation contact (name) of the Risk and Insurance Management's _____ chapter at (telephone number) or (e-mail address).

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 nearly 3,800 industrial, service, nonprofit, charitable, and governmental entities. The Society serves over 9,500 risk management professionals around the world.

###

APPENDIX 9: Sample Monthly Meeting Agenda



**Chapter
Logo**

(MM/DD/YY) Meeting Agenda

(Title/Topic)

(with Speaker or Format)

Start time: (____ a.m./p.m.)

End time: (____ a.m./p.m.)

Time Allotment: Agenda Items to be discussed/presented

15 minutes

Networking

20 minutes

Meal

5 minutes

Welcome to visitors, "Who we are", and Introductions

10 minutes

Reports on Resolution of Old Business; new RIMS or chapter

business

30 minutes

(Title, Speaker, Topic, Format)

15 minutes

Open floor for Question and Answer period

5 minutes

Distribute and fill out Evaluation Forms

5 minutes

Wrap up, Upcoming Programs

30 minutes

Networking

2 hrs 15 minutes

APPENDIX 10: Post-Meeting Evaluation Form



Chapter Logo

_____ (date) **Post-Meeting Evaluation**

Speaker name _____

Please rate on a scale of 1 to 5 with 5 being the best. Circle one.

Knowledge of the subject	1	2	3	4	5
Presentation skills	1	2	3	4	5

Chapter Moderator

Flow of presentation	1	2	3	4	5
Ability to stay within time constraints	1	2	3	4	5

Program Content

Was clear and thorough	1	2	3	4	5
Met stated objectives	1	2	3	4	5

Relevance

Information was timely and useful	1	2	3	4	5
Contributed to my understanding	1	2	3	4	5

What other topics would you like to see addressed in the future?

How could _____ chapter better meet your needs?

Would you like to volunteer? What kind of contribution do you have in mind?

Please write additional comments on the back of this sheet. Your honesty is encouraged.

May we quote you? YES / NO (circle one)

_____ Name & Chapter Title (optional)

(This evaluation may be used for each speaker on a panel)



APPENDIX 11: Speaker Evaluation of Chapter



Speaker Evaluation of Chapter

Your opinion counts! We would like your feedback on how you think the session went. Please take some time to rate your session.

Speaker Name: _____

Program Title: _____

Date: _____

Using a five point scale, please circle the rating you feel is appropriate for each question.

	Poor			Outstanding	
The meeting room was appropriate for your session.	1	2	3	4	5
The audience was at the expected education level.	1	2	3	4	5
I felt the session overall was	1	2	3	4	5
I received all information needed to prepare.	1	2	3	4	5

Once at the meeting, I was greeted and introduced to members of the chapter(s). YES or NO (circle one)

The Audio/Visual equipment I requested was available and in working order YES or NO (circle one)

What topics would you like to present in the future to RIMS members?

How could RIMS have helped you improve your presentation?

Additional Comments:

Thank you for providing us with important feedback! Please return to (insert name) by fax at (###) ###-####.

