



# HOW TO FORM AN SGMP CHAPTER

There are 10 tasks that need to be successfully completed and approved by the SGMP National Board of Directors for an SGMP interest group to be granted a charter as an official SGMP chapter. Below are those 10 tasks, followed by a summary of the overall chartering process and timeframe and greater detail and tips for each of the tasks.

## **AT-A-GLANCE LOOK AT THE TEN TASKS**

1. Roster of steering committee members
2. Roster of chapter board of directors members
3. Roster of 35 SGMP chapter members
4. Proposed chapter name and logo with brief chapter history
5. Chapter calendar of monthly meetings
6. Chapter budget of income and expenses
7. Completed chapter Web site
8. Completed application for chapter bank account
9. Completed application for chapter PO Box
10. Completed SS-4 form for employer identification number

## **SUMMARY OF THE PROCESS**

The process of forming a local SGMP chapter essentially starts with an awareness meeting and then ends with a chartering meeting. The entire process should be able to be completed within one year. The shortest period from awareness meeting to chartering meeting has been four months.

SGMP will provide guidelines to and assistance with every step of the process in between. And at those two “bookend” meetings, SGMP will essentially handling the entire program—including guest speakers.

But the real work—getting the administrative tasks completed, the calendar and website created, and the members to join—is the responsibility of the interest group’s steering committee. The day-to-day operations of all SGMP chapters are the responsibility of the chapter’s leadership. So, by design, the chartering process serves as a good indicator of, and excellent practice for, the continued success of the chapter.

Let’s now take a more detailed look at the steering committee, the awareness meeting, the provisional recognition step, the 10 tasks, the petition step, and the formal recognition with the charting meeting.

## **STEERING COMMITTEE**

The steering committee consists of the steering committee chair, membership subcommittee chair (who oversees membership recruitment), finance subcommittee chair (who oversees the budget and financial requirements) and program subcommittee chair (who oversees the compilation of the events calendar), plus any other individuals interested in participating.

All members of the steering committee must be SGMP members in good standing. This group of individuals can determine their leaders and their roles in whatever way the group sees fit. The steering committee chair will be SGMP’s primary contact throughout this process and should determine, sooner rather than later, who would be best-suited to oversee the development of the chapter website.

The steering committee should meet monthly (in person or by teleconference) throughout the chapter formation process. That meeting would best occur midway between the monthly interest group meetings, so that that midway point can be used to follow-up on items from the previous interest group meeting and to prepare for items at the next interest group meeting. Each subcommittee chair should present an update and each of the 10 tasks should be discussed.

### **SGMP Responsibilities:**

- Confirm membership status of each steering committee member
- Provide guidance and support throughout the chapter formation process

### **Local Responsibilities:**

- Determine leaders for committee and subcommittees
- Select a committee member to oversee progress on each of the 10 tasks
- Meet at least monthly outside of the monthly interest group meetings
- Prepare petition for charter

## **AWARENESS MEETING**

The awareness meeting is a catered event (breakfast, lunch, or dinner) where the SGMP mission, member benefits, and chartering process are presented to government meeting professionals in that area who have been identified as potential members. A list of hot prospects—and even some new members!—will be on hand by the end of the meeting, as will additional volunteers to serve on the steering committee.

### **SGMP Responsibilities:**

- Before:* provide list of area member prospects
- provide list of area members
- produce press release of awareness meeting
- provide national representation, including speaker
- provide agenda for meeting
- provide promotional materials for distribution at meeting
- pay all costs associated with national representatives
- During:* make presentation on-site about SGMP and fire-up the crowd!
- After:* prepare report for the SGMP National Board of Directors

### **Local Responsibilities:**

- Before:* compile a steering committee of area government meeting leaders
- determine the date/time/location for the awareness meeting (to be approved by SGMP)
- determine the date/time/location for the next monthly meeting
- distribute press release of awareness meeting in area, as appropriate
- extend invitations to the meeting and work that list leading up to the event!
- make all on-site arrangements for the meeting, inc. nametags, F & B and A/V
- make hotel arrangements for national representatives
- sponsor or pay for any on-site meeting costs
- During:* provide steering committee member to open and close the meeting
- distribute and collect membership applications
- sign up additional steering committee members
- announce the date/time/location of next steering committee meeting
- announce the date/time/location of next monthly meeting
- After:* follow-up with all meeting attendees to encourage membership and attendance

## **RECOGNITION AS AN INTEREST GROUP**

Right after the awareness meeting, the national representatives who were in attendance will send a report to the National Board summarizing the event. That report could, or could not, include a recommendation to the board for granting provisional recognition as an official SGMP Interest Group. Once that recognition has been granted, that interest group will begin to receive priority support from SGMP on addressing the 10 tasks required to be able to formally petition the National Board for a charter as an SGMP chapter.

Some chapters have required more than one awareness meeting over time. Some awareness meetings have never resulted in subsequent provisional recognition, let alone official status as an SGMP chapter.

SGMP Responsibilities:

submit report to National Board  
approve provisional status or provide direction on needed improvement/actions  
produce press release of recognition as an SGMP interest group  
announce provisional status to interest group and on SGMP website

Local Responsibilities:

(if recognition approved)      distribute press release in area, as appropriate  
(if recognition denied)      redouble efforts to build awareness, gather steam, gain members

**DETAILED LOOK AT THE TEN TASKS**

1. **Roster of Steering Committee Members:** The chapter steering committee consists of the local leaders who will oversee the interest group through its chartering process and up to your chartering meeting. This committee will include the committee chair and the chairs of each of the three required subcommittees (membership, finance, programs), but could include additional members as needed. They will normally select their own successors who will serve on the chapter board of directors that will be sworn in during the chartering ceremony.
2. **Roster of Chapter Board of Directors Members:** The chapter board consists of five officers and three directors who will lead the chapter after the chartering ceremony. The first chapter board will be sworn in during the chartering ceremony. The chapter board will consist of a president, first vice president, second vice president, secretary, treasurer and three directors. The second chapter board will include all of these positions plus the immediate past president.
3. **Roster of 35 SGMP Chapter Members:** This roster must include 35 individuals (including at least 18 planners) in good standing who have confirmed their intention to affiliate with the new chapter. The individuals on the confirmed roster that are presented to the National Board with the chartering petition will be considered as the chapter's charter members. This task will likely be the last one to be completed. It will require persistent effort from the entire steering committee through the chapter formation process.
4. **Proposed Chapter Name and Logo with Chapter History:** Chapter names must now contain a geographic identifier to define the chapter's boundary. Chapter logos must now incorporate "SGMP" somewhere in the logo. Included here should also be a one-paragraph summary about the chapter's founding to be included in the SGMP archives and used in the marketing of the chapter.
5. **Chapter Calendar of Monthly Meetings:** The calendar must be for a period of at least 12 months beyond the chartering date. Chapters must hold at least 10 events over each 12-month period, which must include the four programs made available each year through SGMP's Gilmer Institute of Learning. The following information must be noted for each event on the calendar: date, time, location, topic and speaker.

6. **Chapter Budget of Income and Expenses:** The budget must be for a period of at least 12 months beyond the chartering date. Chapters must utilize the standard SGMP budget template, into which the projected income and expenses will be placed. New chapters will receive a \$200 check from SGMP on the date of their chartering. All membership dues are collected by SGMP. New chapters will receive 40% of the amount of membership dues for its charter members on the date of, or shortly thereafter, their chartering. For the first year after chartering, the new chapter will receive a monthly dues revenue share check from SGMP equal to 40% of all new and renewing members dues received at SGMP for that month.
7. **Completed Chapter Website:** The chapter is responsible for creating and maintaining its own website, which will have a link directly from the SGMP website. The chapter site must conform to SGMP's chapter website guidelines and ready to "go live" on the date of the chartering. From the time of the awareness meeting to the chartering meeting, the group's web presence will be a temporary page to be set-up by SGMP and accessed through the SGMP website. This task will require a lot of time to complete and should be prioritized early on in the chapter formation process.
8. **Completed Application for Chapter Bank Account:** This application must conform to SGMP's financial guidelines and be ready to be provided to your local bank immediately after your chartering.
9. **Completed Application for Chapter PO Box:** This application must conform to SGMP's financial guidelines and be ready to be provided to your local post office branch immediately after your chartering. The PO box will be used for all official chapter correspondence; SGMP dues revenue share checks are sent only to this PO box address.
10. **Completed SS-4 form:** This application must conform to SGMP's tax status and be ready to be sent to the Internal Revenue Service immediately after your chartering:  
<http://www.irs.gov/pub/irs-pdf/fss4.pdf>

SGMP Responsibilities:

- provide the forms, as required, and the guidance, as needed, for addressing the 10 tasks
- compile and distribute the roster of confirmed affiliated members on a monthly basis
- compile and distribute the scoresheet of 10 checkboxes for required tasks on a monthly basis

Local Responsibilities:

- complete the 10 tasks
- prepare for the charter petition process

**PETITIONING FOR A CHARTER**

SGMP Responsibilities:

- approve (by staff) each of the completed items as ready for inclusion (to national board)
- compile all 10 approved items into formal petition to national board
- submit and present charter petition to national board
- approve chapter status or provide direction on needed improvement/actions
- announce chapter status to interest group

Local Responsibilities:

- Submit to staff documentation of each of the 10 required items

## CHARTERING MEETING

The chartering meeting is a catered event (breakfast, lunch, or dinner) where the first chapter officers are installed and the official SGMP charter is presented. All charter members are invited, but any other interested government meeting professionals in the area may also attend. It's a great meeting to "show off" to member prospects and VIPs. The meeting will be opened by and led by SGMP leaders. The first half will address SGMP and the interest group. The second half will be the chartering ceremony with installation of officers, after which the gavel will be passed from the national to the local and the chapter president will then lead and close the meeting.

### SGMP Responsibilities:

*Before:* produce press release of chartering

produce official chapter charter

produce official chapter gavel

provide national representation, including speaker

provide agenda for meeting

provide promotional materials for distribution at meeting

pay all costs associated with national representatives

*During:* acknowledge and thank steering committee and local leaders

read the charter's resolution and decree

install chapter officers

present the chapter with their official gavel

present the chapter with their official charter

present the chapter with a chartering check for \$200

present the chapter with press release on chartering

*After:* \*celebrate!!!

\*link chapter website to SGMP website

\*announce new chapter to all other SGMP chapters

\*send the chapter with a dues revenue share check according to number of charter members

\*send SS-4 form to IRS

\*send officer training manuals to chapter board

\*send new membership cards with chapter affiliation to charter members

\*as soon as possible after (immediately upon or within two weeks of) the chartering meeting

### Local Responsibilities:

*Before:* invite prospects and area VIPs, as appropriate

make arrangements for a group photo

*During:* this is your time to shine!

take group photo at conclusion of meeting

*After:* \*celebrate!!!

\*"go live" with the chapter website

\*distribute press release on chartering in area, as appropriate

\*open bank account

\*open PO box

\*as soon as possible after (immediately upon or within two weeks of) the chartering meeting

## RESOURCES

Here is your contact at the SGMP headquarters who will either provide you the information and guidance you need or point you in the direction where you can get it:

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