CSA Chapter Charter Guidelines

How to Start a CSA Chapter

https://cloudsecurityalliance.org/chapters

Education • Awareness • Networking • Growth

CSA Chapter Charter Guidelines
How to Start a CSA Chapter

TABLE OF CONTENTS

CSA Chapter Chartering Guidelines

Program Overview

Our chapters are made up of local security professionals who volunteer to increase cloud security awareness in their local community and provide outreach for CSA research, education and training resources. They work to solve cloud vulnerabilities and challenges, by collaborating with other experts in the field to establish cloud security best practices. Chapters offer participants an opportunity for leadership in regional communities, and the chance to establish thought leadership in their field.

Mission and Vision for CSA Chapters

Our mission is to increase cloud security awareness and education, develop research, and promote best practices in cloud security, while offering an opportunity for leadership in the community and thought leadership in the field. We envision creating a more secure cyber world by engaging IT and security professionals in our communities and beyond, with our cloud security best practices, education, training and certifications, and through thought leadership.

Chapter Goals

CSA's goals for Chapters:

- Build cloud security awareness at the community level
- Provide cloud security educational opportunities, training, and tools at the community level
- Build a network of security professionals and subject matter experts
- Spread CSA and cloud security outreach in the local community
- Participate in CSA research and development
- Create a forum that facilitates resources and security discussions for information security professionals to collaborate, share knowledge, and develop leadership skills
- Be a leader in the cloud security field

Areas of Success

CSA is known for its education, training, and timely research. CSA Chapters are an integral part of the success of CSA, its community outreach, and establishment of industry best practices. CSA Chapters provide education and training locally, collaborate on research, and are industry thought leaders.

Chapter Structure

CSA members are encouraged to create new chapters in their locales. Below is an overview of the structure of a CSA Chapter:

Getting Started

- Reside in the area in which you plan to start a chapter for a minimum of one (1) year
- Have proven leadership experience in a professional setting
- Not currently serving as an officer of a competing security organization chapter
- No previous criminal convictions
- A minimum of 20 members are required
- A minimum of 5 board members are required

Governance
- All official CSA Chapters agree and abide to the CSA Chapter Code of Ethics under the CSA Global umbrella
- Chapters shall follow the guidelines set forth in the CSA Official Chapter Handbook
- Chapters shall establish and maintain bylaws. This document serves as the rules by which the chapter operates
- Chapters must ensure compliance with all tax, privacy, and local/state or district/national laws applicable in their country
- Chapters must abide by CSA trademark usage requirements and CSA branding guidelines

Leadership
- There are five required officer positions: President, Secretary, Membership Director, Treasurer, and Program Director
- Additional positions may be added as needed:
  o Vice President
  o Speaker Coordinator
  o Sponsor Coordinator
  o Website Coordinator
- These positions may only be held by CSA members who do not hold a leadership position in a competing security organization
- No more than two people should be on the board from the same company
- A member from another security chapter organization may join as a member of a CSA Chapter however, they may not serve as a board member

Dues and Funding
- The chapter will determine its own membership dues or may choose to not charge dues
- Chapter member dues are to be collected by the chapter, if applicable

Minimum Activity Requirements
- Participate in monthly chapter leadership calls
- Must maintain an active chapter community of the CSA Circle platform
- Provide CSA global with Board of Director meeting minutes
- Choose event themes based on CSA's research topics
- Provide CSA Global with a list of board member names and contact details
- Chapters are to hold a minimum of three member meetings within the calendar year
- Four Board of Director meetings should be held per year
- Provide an annual status report to CSA Global on: chapter meetings, non-member events, special activities, and changes to the chapter leadership
- Chapters are required to follow all guidelines set forth by the Official Chapter Handbook

Benefits of Chapter Membership
There are many rewarding benefits that members receive through CSA Chapter membership. CSA Chapter members have the potential to grow both personally and professionally, increase their information security knowledge, education, and training, and receive access to member discounts, tools, and resources. Benefits also include membership in a global professional network community, privileged offerings, and exclusive programs.

Personal and Professional Development
- Local and global events with professional networking, education, training, and certifications
- CSA Circle global professional online community for networking, collaboration, discussion, and industry insights, including 30+ research working groups, education & training, and volunteer opportunities
- Job board, including tools and resources for job seekers and companies searching for qualified candidates
- 100+ CSA Chapters globally offering events and training
- Opportunity for leadership as a chapter board member or speaking at industry events
- Writing articles for publication

Education, Knowledge, and Training
- Contribute to 30+ research working groups
- Participation in research initiatives helping to establish industry best practices
- Discussion forums with thought-leaders, subject matter experts, and industry professionals
- Industry survey participation and results
- Webinar library with over 250+ offerings
- Earn CPE credits by participating in professional activities
- Free industry-leading research whitepaper downloads
- Access to CSA Certification resources and tools
- Access to the CSA GDPR Center of Excellence
- Early access to CSA research

Discounts, Tools & Resources
- Member discounts on conferences and events
- Member discounts on education, training, and certifications
- Free audit and compliance tools and programs
- STAR auditing standards and compliance guidelines and procedures
- Consensus Assessment Initiative Questionnaire (CAIQ) auditing tool
- STAR Registry posting
- Access to over 250+ CSA research whitepapers
- Access to the CSA CloudBytes webinar library (170+ webinars)
- Access to CSA research analysts

Eligibility Requirements
To be eligible to start a chapter, you will need to meet the following requirements:
- Reside in the area in which you plan to start a chapter for a minimum of one (1) year
- Have proven leadership experience in a professional setting
- Not currently serving as an officer of another security chapter organization
- No previous convictions of criminal activity or conduct

If you do not meet the above eligibility requirements, you may not be eligible to start or lead an CSA Chapter. If you feel you may still be eligible, please contact chapter-support@cloudsecurityallinace.org to discuss your particular situation.

NOTE: CSA holds the right to audit the member's professional experience or request a criminal background check at our discretion if concerns are raised about the member's credibility and expertise.

Chapter Application Process

There are three stages involved in the process of becoming an Official Chapter of CSA. Below is an overview of each stage:

1. **Application Stage**
    During this phase, members will submit an application to start a chapter in their geographic location. Only complete applications that meet all of the requirements will be considered.

    During the Application stage, it is important the application be completed as thoroughly as possible, paying particular attention to the **Mission/Vision, Objectives/Focus**, and **Research/Activities/Projects** sections:

    -   **Mission/Vision** – What is the Mission/Vision for the chapter? What do you want the chapter to achieve/accomplish?

    -   **Objectives/Focus** – What is the specific area of interest that your chapter would focus on, such as research, education/training, networking, community outreach, etc.?

    -   **Research/Activities/Projects** – What activities, projects and cloud research areas do you propose for the chapter?

    Applications will be thoroughly reviewed and vetted. The focus will be on the value and benefit to the local community and to CSA outreach. The review committee will be looking for a strong, compelling reason to start a chapter in a particular area, including the vision, objectives, and goals of the proposed chapter.

    An interview will be scheduled between applicant and CSA's Chapter Department to review the completed application. If approved, the chapter will proceed to the Chartering stage.

2. **Chartering Stage**
    Approved chapters will receive a chapter handbook, which contains important information in how to manage the chapter.

    The chapter will need to schedule a start-up meeting with interested members to discuss the mission/goals, objectives/focus, research/activities/projects of the chapter.

    -   **Discuss the Mission/Goals, Objectives/Focus, Research/Activities/Projects**
        Interested members should discuss and determine the mission and goals of the chapter, as well as the areas of focus that the group is interested in, such as education & training, community outreach, networking and professional development. The applicant shall review his/her chapter concept plan with the group and discuss details pertaining to the proposed chapter; geographical boundaries, board of directors, meeting location, frequency of meetings, membership fees (to charge or not to charge), legal status, communications, start-up costs, etc.

Chapters are in the chartering stage for 1 year. During this time they must hold a minimum of three chapter meetings, and 4 chapter Board of Director meetings. They may choose to hold additional member meetings and activities. All Board of Director meeting minutes and notes should be submitted to CSA Global for review.

Chapters will be provided with the following material to aid in their management of the chapter:

- **CSA Official Chapter Handbook** – contains policies and guidelines for managing an Official CSA Chapter

- **Service Level Agreement** – A list of standard services provided to chapters, and CSA's expectations of chapters.

- **Chapter Logo** – a chapter logo to be used for all printed materials, social media sites, and website

- **CSA Circle Chapter Community** – CSA will create a Circle community for the chapter on CSA's Circle platform

- **CSA Chapter LinkedIn Group** – CSA will create a CSA Chapter LinkedIn group specific to the Chapter

- **Chapter Branding Kit** – CSA branded PowerPoint presentation files, business cards, CSA collateral, CSA logos, and CSA deliverables will be available for chapter use

- **Sample Chapter Bylaws** – CSA provides sample bylaws template to use, but the chapter may develop its own

Elected Officials

There are five required positions to operate a CSA Chapter: President, Secretary, Membership Director, Treasurer, and Program Director. These positions should be filled by five different CSA members when submitting the CSA Chapter Application. Elections can also be held during the first meeting. *Starting a chapter takes a lot of hard work, time, and dedication. It is important to recruit board members who are willing to make the commitment necessary for the chapter to be successful.*

Chapters can define the specific roles for each officer; however, a basic job description for each one is as follows:

- **President** – responsible for presiding over the board of director meetings and ensures that all rules and regulations are observed, appoints and serves as a member of all committees, decides tie votes and ensures that all officers perform their duties.

- **Treasurer** – responsible for keeping an accurate record of all chapter receipts and expenditures. Treasurer shall collect all dues and other monies, depositing in a repository in the name of the chapter.

- **Secretary** – responsible for recording the proceedings of the chapter, writes and conducts the correspondence, as well as prepares reports due to CSA Global.

- **Membership Director** – responsible for promoting the membership growth of the chapter, and ensuring new and potential members are able to take part as easily and smoothly as possible. Also responsible for maintaining membership records to ensure they are accurate

and up-to-date.

- ○ **Program Director** – responsible for scheduling and promoting membership activities, scheduling speakers, and driving chapter engagement.

3. **Official Chapter Stage**
   After a period of one year, meeting all of the requirements above, the chapter will receive Official Chapter status. At this time, chapters are required to sign a CSA Chapter Memorandum of Understanding, which outlines the partnership expectations between the chapter and CSA.

   Once a chapter has 'Official' status, we highly encourage the chapter to file as a Legal Entity. Being a legal entity gives the chapter an opportunity to process funds and revenue through education and training, events and meetings, and general chapter sponsorship.

   Chapters legally form for one of three reasons
   - To open a bank account to accept and process money. A bank may require legal formation. Individual banks and country requirements differ on what is required to open a chapter bank account.
   - To contract as a legal entity: For instance, to contract with CSA to allow the chapter to bring in Its own CCSK certified (by CSA) trainer.
   - To gain credibility with partners, sponsors and members.

   Legal formation is not required by CSA, but highly encouraged.

   Legal Registration – Legal registration is the sole responsibility of the chapter. Additional information and details about legal formation can be found in the CSA document, "Legal Formation and Bylaws".

   CSA cannot provide any legal assistance regarding how to set up a chapter entity. Therefore, CSA advises all members to seek legal advice in your local jurisdiction on any questions regarding the establishment of a legal entity. If you decide to legally register the chapter with the state or country as a corporation, not-for-profit, limited liability, etc., then submit a copy of the documentation to CSA for our records once completed.

Resources and Tools

CSA is dedicated to helping its chapters become successful through increasing their membership and promoting cloud security. A complete list of supporting documents to aid in Chapter management can be found here: https://cloudsecurityalliance.org/chapters/resources/. Additionally, to assist with the formation and management of a CSA Chapter, CSA provides the following support:

- **Chapter Representatives**
  Each region has a dedicated point of contact to provide chapters with guidance and support.

- **Marketing Materials**
  Access to a variety of marketing templates with your chapter's logo for your marketing and communications efforts.

- **CSA Collateral**
  Access to CSA branded collateral that outlines and highlights CSA education, certification, and training programs, research and development, and membership opportunities.

- **Communication Resources**

  o **CSA Circle Community Platform** – CSA Circle is a community forum where members can host discussions, plan meetings, share resources, and connect with peers.

  o **Chapter Leadership Newsletter** – CSA distributes a newsletter to official chapter board members globally. It provides details about chapter activities, new chapter tools and resources, programs, engagement activities, as well as updates and announcements from CSA.

  o **LinkedIn Group** – CSA provides chapters with a CSA Chapter LinkedIn group page, specific to their Chapter.

  o **Leadership Meetings –** there are monthly chapter leadership meetings regionally for current chapter board of director members. They include updates and engagement opportunities from CSA Global, CSA research & development, and current CSA and partner events.

If you have any questions or comments, please email: chapter-support@cloudsecurityalliance.org.