CFMA Chapter Tool Kit

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**Contacting CFMA Headquarters staff and departments**
Click [here](#) for a list of staff and their responsibilities. Click [here](#) to contact a department within CFMA. Unsure of who to contact? Contact [Farah Iaia](#) for assistance on whom at CFMA to contact.

**Chapter board and committee structures**
Each chapter must have 4 officers: President, Vice-President, Secretary and Treasurer. The roles of each position should be in writing so each officer is aware of the requirements of the position upon accepting the position. Your chapter’s bylaws likely have description of each role but this may not be all-inclusive of the responsibilities of each position. Some chapters have one-year terms for their officers and some chapters have two-year terms; some chapters have officers move through all of the roles while others do not. Additional information can be found on the Succession Planning page in the Chapter Best Practices section of this document.

In addition to chapter officers, each chapter should have a minimum of 2 committees: Membership Committee and Program Committee. The Chair of these committees should be a member of your chapter’s board; if the Chair is not a board member they should be invited to give updates at board meetings. The members of these committees should come from your chapter’s membership, not the board. These committees should have written descriptions of the tasks they are responsible for, samples can be found on the Committee Descriptions page in the Chapter Best Practices section of this document. This will define the role of the committee as well as make clear the expectations of members of the committee.

The number of board members on a chapter’s board varies by chapter and should be the number that works best for your chapter. You may want to consider an odd number of members so a vote does not end in a tie.

**Chapter bylaws**
All chapter board members should have a copy of the chapter’s bylaws. These should be reviewed at least once per year to be sure the chapter is operating in accordance with the bylaws. If the chapter is not operating in accordance with the bylaws the chapter may: 1) change how the chapter operates to comply with the bylaws; or 2) re-write the chapter’s bylaws to reflect how the chapter operates. If the chapter is going to re-write the bylaws, sample chapter bylaws can be found on the Chapter Administrative Tools page of the CFMA website. These can serve as a starting point for your new bylaws.
The chapter should send a current version of the chapter’s bylaws to Cathy Wasner to keep on file. This will ensure the bylaws are always available to any new members of the chapter’s board in case they do not get passed down by board members.

**What records should a chapter keep?**

Below are guidelines on how long records should be kept:

- Official documents (Articles of Incorporations, EIN, etc.) should be kept indefinitely
- Financial documents should be kept 5-7 years
- Old versions of bylaws may be useful, it is up to the chapter to determine whether or not these should be saved
- Any records to do not fall into one of the above categories may be kept for a period of time that is determined by the chapter

**Chapter websites**

CFMA provides a website for each chapter free of charge. This website should be used to promote the chapter to both members and potential members. Events should be added to the calendar and contact information for your chapter’s officers, board and committee chairs should be kept current. Chapter websites can be accessed by clicking the on the chapter map. Each chapter needs to assign a member or several members to keep website content up to date. To add a member as a website admin contact Billy Maceus. CFMA staff can help add content and events but overall management of a chapter’s website should be managed by the chapter. For assistance with adding content to a chapter’s website contact Farah Iaia.

**Chapter benchmarking and awards**

All chapters are scored once each year, this score is used to benchmark the chapter and determines which award(s) are earned. Awards are presented each year at CFMA’s Annual Conference & Exhibition. The chapter’s score is made up of items submitted from the chapter as well as items scored by CFMA HQ. Details and everything needed to prepare and submit your chapter’s information can be found at the Chapter Benchmarking and Awards page. Each chapter’s score from the previous year is also available on the Chapter Benchmarking and Awards page. A completed, scored worksheet is sent from CFMA HQ to the member of the chapter who submitted the information each year. If you would like a copy of your chapter’s completed worksheet from a prior year contact Cathy Wasner and the worksheet will be sent to you.

**Chapter showcases**
Chapter showcase videos are show each year at **CFMA’s Annual Conference & Exhibition**. Chapters are encouraged to submit photos highlighting something special the chapter has done during the year – this could be educational, charitable, fun or unique event. Details on the format for your submission and due dates can be found by clicking Chapter Showcases on the **Chapter Benchmarking and Awards page**.

**STAR Program**
The STAR Program is a $3,000 subsidy available to all chapters. To be eligible, a chapter must submit the annual Chapter Affiliation Agreement. STAR Program funds must be used for specific purposes, details can be found on the **STAR Program page**.

**Annual Chapter Affiliation Agreements (CAA)**
Each chapter is required to submit a signed and complete CAA each year. The term of this agreement is the same as the CFMA year; April 1 through March 31. For a chapter’s CAA to be considered complete, all three requirements must be submitted: a Chapter Affiliation Agreement signed by the Chapter President, a balance sheet and proof of the chapter’s latest tax filing (the e-mail receipt of submission will serve as proof, the entire 990 does not need to be submitted). The Chapter Affiliation Agreement can be found is the **Chapter Administrative Tools** page of the CFMA website.

**Chapter Administrators**
Many CFMA chapters have a paid chapter administrator to handle the administrative duties of the chapter. The chapter administrator can be paid hourly or a fixed monthly rate with a minimum guarantee of hours worked. A sample RFP, list of chapter administrator responsibilities and contract for services have been created and can be found at the bottom of the **STAR Program page**. CFMA does have some information on salaries and hours worked by chapter administrators from some of CFMA’s chapters, contact **Cathy Wasner** for the latest version of this document if you looking for guidance on chapter administrator salaries.

**Strategic planning for chapters**
It is important that a chapter periodically holds a strategic planning session. The chapter’s board will change year to year so the direction of the chapter should be re-visited periodically to ensure the board is in agreement with initiatives undertaken by the chapter. The frequency of strategic planning sessions varies by chapter; some chapters have annual sessions while others hold sessions every 2 or 3 years. It is recommended that a chapter not go longer than 3 years without holding a strategic planning session.
Sessions are more effective if the chapter has a facilitator from outside of the chapter. CFMA HQ staff will facilitate a session at no cost to the chapter. CFMA HQ staff facilitate many sessions each year so a staff member can give guidance, share what has worked well for other chapters and communicate resources available for the chapter through CFMA. The chapter may choose a facilitator outside of CFMA, expenses can be submitted using the STAR Program. A chapter may also self-facilitate but it is recommended that at least every 2 to 3 years the chapter hold a session with a facilitator from outside of the chapter to share ideas and guide the discussion.
Chapter Best Practices

This section contains best practices on a variety of topics. This section will be updated regularly with the most current best practices submitted by chapters. If there is a topic you are interested in and do not see it listed here contact Cathy Wasner.

Chapter dues structure and finances
Chapter Health Risk Factors
Chapter Leader Hand-Off Policies
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**Chapter dues structure and finances**

- Chapter dues can include all meetings or payment for meetings can be in addition to chapter dues
  - Annual chapter dues that are all inclusive
    - Can includes meetings, social events, etc.
    - Members may or may not be allowed to bring a guest free of charge
    - Non-members may be allowed to attend a meeting or two for free but there should be a limit to how many meetings a non-member can attend
    - Non-members may be charged for the each meeting they attend
  - Annual chapter dues do not include meetings
    - Members pay for the meetings they attend
    - Members may or may not be allowed to bring a guest free of charge
    - Non-members may be allowed to attend a meeting or two for free but there should be a limit to how many meetings a non-member can attend
    - Pricing for non-members should be higher than for members
    - Discounts for pre-paying for all meetings for the year may be offered

- Non-member attendance at chapter meetings should be limited to just a few times a year.
  - A non-member may be attending for a relevant topic but may not be interested in membership
  - Non-members who continue to attend chapter meetings without becoming a member should be encouraged to become a member or no longer be able to attend chapter meetings
Committee Descriptions

- Descriptions of the tasks of each committee should be in writing and be as detailed as possible
  - Committee Chair roles should be stated
  - Time commitments should be included whenever possible
- Each committee should have a chair and a co-chair.
- It is best NOT to include committee chair and member roles in the chapter’s bylaws as these are subject to change and will make the bylaws out of date.
- A description of the committee’s tasks should be given to each potential committee members before they accept a position on the committee so the expectations are clear.
- At each chapter meeting, share the committee descriptions and include opportunities to join a committee in the announcements.
- Sample descriptions can be shared, contact Cathy Wasner to get committee descriptions from other chapters.
Engaging Past Chapter Presidents

- Your Past Presidents can be made at-large or lifetime members of the board to keep them involved

- Past Presidents can serve in an advisory role to offer to the current Chapter President should the need arise

- A Past President Advisory Council can be created and tasked with special projects to help the chapter:
  - Manage the election process
  - Recruit members for the chapter’s board
  - Mentor members in line to become Chapter President
  - Select your Member of the Year as they are in the best position to see how a member has been contributing over time

- Past Presidents can talk with those interested in becoming board members and serve as mentors

- The task of maintaining the history of the chapter can be assigned to a Past President or group of Past Presidents
Growing Chapter Membership

- Chapter administrators can focus on community contact and attracting potential members

- A local construction management or accounting program may be looking for speakers – members of the chapter would be ideal

- Marketing the CFMA chapter to other associations can increase awareness of the chapter
  - Members of the chapter may be members of another association as well, utilize those relationships
  - Joint events are a great way to promote CFMA

- Consider ads and promotional items

- Get involved with the local Chamber of Commerce – often new members have an opportunity to talk about their organization so others can learn what the CFMA chapter does

- Have a CFMA booth at a local event

- Encourage students to hold CFMA meetings at a local college; invite these students to chapter meetings to facilitate networking

- Members of the chapter’s board should each personally invite a potential member to a meeting
Onboarding New Members

- Assign a board member to be a new member’s mentor for their first year of membership. The board member should reach out to the new member in between meetings and sit with the new member at meetings.

- New member’s name tag and certificate presented to them at the meeting

- Share new member e-mail from CFMA with board so all board members can welcome the new member at their first meeting

- Send the new member a welcome letter highlighting upcoming chapter meetings and events, follow up with a phone call inviting them to the next meeting/event

- Reach out to a new member who has registered for an event letting them know someone from the board will meet them when they arrive

- Forward the new member e-mail to the member with comments from the Chapter President to welcome the new member to the chapter

- Spread out board members at meetings to encourage board member interaction with new members

- Assign a board member to each new member for the first few meetings to make them feel welcomed.

- Encourage committee involvement from the new member’s first meeting.

- Highlight new members in a slide show at meetings

- New member section on the chapter’s website with a photo, professional information and a few fun facts about the new member

- Hold a new member breakfast/new member orientation (frequency varies by chapter) to encourage new members to get to know board members and bond with other new members.

- Give each new member a small gift with the CFMA logo.
Partnerships with Other Associations, Organizations or Chapters

- Partnering with other associations can be valuable for all of the associations involved. This offers the opportunity to share CFMA with individuals and companies in the construction industry who might not otherwise have been exposed to CFMA.

- It should be clear that a meeting or event is a joint meeting or event with several associations and no one association gets top billing.

- Partnering on charitable events and labeling this as an industry event can be successful. For example, a toy drive among several associations can be promoted as the construction industry collecting toys for kids.

- Partnering with another chapter on large events, costly speakers or educational courses could be advantageous for all chapters involved.

- Regional conferences are a great example of chapters collaborating with other chapters.
Retaining and Engaging Chapter Members

- Welcome new members individually

- Luncheon just for new members to allow them to network with each other and spend time with the board

- Give a CFMA branded small gift to new members of the chapter

- Invited unengaged members to a luncheon to see what can be done to get them engaged
  - Allow networking with committee chairs
  - Hold a question and answer session on what can increase engagement

- If attendance is lacking consider changing meeting time and location
Recruiting and Engaging Committee Members

- Each chapter needs committees, the board cannot run the chapter.
- When looking at your committee structure, identify your core committees.
- Try to get new members to join a committee so they feel more engaged.
- At each chapter meeting or event, each board member should be taking a look around the room and identify members who have the patterns and behaviors that would be good on a committee.
- Have your Board submit lists to identify future committee members and committee chairs.
- Make it the responsibility of the committee chair to find their replacement.
- When asking members to join a committee, ask them directly.
- Ask new committee members to serve on the committee for a one year term rather than asking for longer commitment.
- Each committee should have goals (sponsorships, venues, etc.) to measure success and effectiveness.
- Committee Chairs should be members of the chapter’s board to ensure the committee direction matches the strategic vision of the chapter.
- If Committee Chairs are not board members, a board member should be assigned to each committee as a liaison.
- CFMA HQ has sample committee descriptions from other chapters, contact Cathy Wasner to get samples.
Running/Managing a Board Meeting

- Provide a meeting agenda, minutes and outside reports prior to the meeting
  - Board members should be given the opportunity to submit items for the agenda prior to the meeting.
  - Agenda should consist of strategic and committee updates.
  - Discussion at the meeting should be kept high level. Committee reporting should be a summary of committee work and actions taken.

- Keep the meeting on schedule – begin and end on time.

- Items not on the agenda may need to be discussed. These discussions should be brief. If lengthy discussion is necessary on the topic it should be added to the next board meeting agenda or the discussion should occur outside of the board meeting.

- Determine the best time of day for the board to be focused and actively participate in the meeting. If attendance and participation are lacking consider changing the time of day or day of the week to better accommodate the schedule of your board members.

- By-laws and board position descriptions should be given to all new board members and should be reviewed annually with all board members.
Running/Managing a Chapter Event

- An agenda should be issued in advance of all meetings
- A timeline is helpful to keep the meeting on track
- A notice or invitation should be sent 3-4 weeks prior to the event
- Responsibilities should be clearly defined prior to the event
Scholarships

Scholarships can be offered in a variety of formats in a variety of ways:

- For students
  - Could be offered to those majoring in accounting or construction
    - Possible requirements:
      - Maintain a certain GPA
      - Application to show student meets pre-determined eligibility criteria
      - Write an essay on a topic chosen by the chapter’s scholarship committee
      - Involvement with the chapter
        - Chapter may or may not have a say in who get the scholarship, some schools make the determination
  - For chapter members
    - Pay full CFMA Annual Conference registration fee for chapter officers
    - Subsidize CFMA Annual Conference registration fee for members
    - Reimburse for cost of CCIFP Overview and/or exam
    - Scholarship provided to chapter members furthering their education in accounting or construction
- To those with a relationship to the chapter
  - Relatives of chapter members
  - Employees at members’ companies
- Internships
  - Members’ companies hire an intern majoring in accounting or construction; chapter subsidizes some of the cost
    - Directly helps a student in accounting or construction by giving them work experience and income
    - Companies benefit by finding qualified candidates and receiving subsidy for their intern
Social Media Presence

For a chapter, social media can be used to:
- Post event and meeting notices
- Post event recaps with pictures
- Retweet/reshare relevant industry related content and tag the original contributor
- Thank sponsors, speakers, etc. and tag them

When using social media, keep in mind:
- The goal of social media is to get people engaged with CFMA.
- Content does not have to be created by the chapter, you may share content from another group or publication related to the industry.
- Ensure content is relevant, do not share something just for the sake of posting.
- Content should be relevant to current members but the goal should be on expanding the reach of the chapter outside of current membership.
- Chapter members can share chapter events that are posted.
- Chapter members can tweet about upcoming events and tweet while at a chapter event.
- A good example of a chapter using social media is Massachusetts, they do a good job of using LinkedIn and Twitter.
- A good example of a Regional Conference using social media is the Southwest Regional Conference’s use of Twitter.
Sponsorships

Sponsorships can be structured a variety of ways:

- Meeting sponsors
- Special event sponsors
- Annual sponsor

Meeting sponsorship can include:

- Sponsor can introduce the speaker/program
- Sponsor logo included on all meeting material
  - On the meeting invite
  - In presentation at the meeting
  - On materials/handouts at the meeting
  - On the chapter’s website

Special event sponsorships vary based on the type of event:

- For an event with 1 sponsor, the sponsorship can be structured like a meeting sponsorship.
- For an event with multiple sponsors, various portions of the event can be sponsored, such as:
  - Cocktail hour sponsor
  - Dessert sponsor
  - Golf cart sponsor
  - Hole sponsor
- Event sponsorships can have various levels offering tiered benefits:
  - Set number of tickets to the event with the sponsorship
  - Podium time
  - Logo displayed at the event and on materials promoting the event

Annual sponsorships allow a chapter to fund meetings an events throughout the year.

- Many sponsors prefer spending sponsor dollars once per year rather than being asked several times throughout the year
- Benefits of annual sponsorship can be:
  - Logo on the chapter’s website and in all meeting materials/presentations
  - Set number of tickets to special events throughout the year
  - Allowing a set number of guests from the sponsor to attend chapter meetings/events throughout the year
- Allowing the sponsor to introduce the speaker/program and share what their company does
- A chapter can be creative when structuring annual sponsorships and fit the benefits to how the chapter operates.
Successful Fundraising Events

Some chapters hold events to raise funds. Funds raised can provide scholarship money or add to the chapter’s reserves or can be raised for a charity.

Some successful events include:

- **Golf Outings**
  - Sponsorships
  - Raffles, chipping contest, putt-a-thon at the outing
- **Casino Night**
- **Toy Drive**
  - Often a part of a chapter’s holiday event
    - Incentives to bring a toy can be offered; i.e., get a drink ticket if you bring a toy
  - Partner with a local organization to collect, sort and deliver toys
- **Charity Walk or Run**
  - Sponsorships
  - Chapter or companies may match money collected
- **Food Bank**
  - Donate food
  - Help pack food boxes at a local food bank or for a local organization
- **Habitat for Humanity build**
- **Ronald McDonald House**
Succession Planning

- Planning for future leadership of the chapter should be ongoing with potential candidates identified throughout the year.

- Monitor participation/attendance at all chapter meetings, events and activities and identify those members who show an interest in CFMA and the chapter – these members may be the chapter’s future leaders.

- Chapters have a variety of officer structures, it is important to choose the structure that works best for your chapter.
  - Officers cycle through all chairs – Anyone asked to be an officer knows this is a 4 year commitment. Benefits of this structure include the officer gaining a well-rounded view of chapter operations by the time they assume the presidency.
  - Immediate Past President is an officer – The knowledge and perspective of the Immediate Past President can be valuable to the chapter’s leadership. If the Immediate Past President is an officer, the officer terms and succession can be structured in several ways:
    - Three-Year Path – Treasurer and Secretary are removed from the progression on the path to President; the progression of Vice President, President, Immediate Past President is a three-year commitment.
    - Four-Year Path – Depending upon how the chapter chooses to structure their officer path, either Treasurer or Secretary are the first step to the path of Presidency. The progression of Treasurer or Secretary, Vice President, President, Immediate Past President is a four-year commitment.
  - Vice President to President – Treasurer and Secretary are removed from the progression on the path to President. A President must only serve as Vice President before moving into the President role.

- Choosing the right candidate for Chapter President:
  - General vs Associate Member
    - The Chapter President should be a General Member, however this is not always feasible. If an Associate Member is President, a General Members should follow; there should never be two Associate Member Chapter Presidents back to back.
    - No more than 50% of a chapter’s officers should be General Members.

- Length of officer term
- **One Year Term vs Two Year Term**
  - Having a one-year term for each officer position allows the chapter to have officers cycle through the chairs with no longer than a four year commitment. However the chapter must have a robust succession plan to continually fill a new officer spot with a new member each year.
  - Having a two-year term for each officer position allows each officer to serve a longer term and potentially make more of an impact on the chapter. However it is not possible to cycle through all chairs so most chapters with two-year officer terms take Treasurer and Secretary out of the cycle and have a Vice President step into the President role to maintain the commitment of no more than four years.

- Whichever structure the chapter chooses, chapter operations should be consistent with the bylaws. If the chapter is not operating in accordance with the bylaws, bylaws should be changed to reflect the way the chapter is operating.

- Chapters who have chapter administrators should include their admin in succession discussions. The chapter admin has interaction with many members and can share thoughts on officer candidates. For continuity of chapter operations, the chapter admin should capture and collect succession thoughts and ideas so these are preserved for future chapter leadership.
**Young Professionals/Emerging Leaders Program**

A chapter may have a program designed to increase engagement among young professionals/emerging leaders in the industry. This program can provide opportunities for involvement within the chapter for high-potential young professionals with some construction finance industry experience. These professionals can serve as an industry resource and share their unique perspectives with others in the local CFMA chapter. This can be a very effective way to get younger professionals in the industry integrated into the CFMA.

**Some Benefits to the Chapter**
- By involving and engaging individuals early in their careers, they are not only much more likely to be committed to CFMA on a long term basis, but also much more likely to convey those benefits of membership to others, further promoting the association
- Adds value for current CFMA members by assisting in the education and leadership training of their high potential employees
- Broadens CFMA’s reach into the industry and community as a whole
- Bring younger CFMA members into leadership roles
- Involves more members in chapter committees
- Expands the reach of the chapter outside to those outside of the typical member
- Increase in membership - it is important to be consistent with maintaining a ratio of 60% general members and 40% associate members

**Sample Program Member Qualifications**
- Must to be nominated by his/her company and sponsored by a current CFMA member
- Has been in the industry a minimum of 2 years in a professional capacity
- Recommended length of time is until the age of 36, or 5 years in the program, whichever comes first
  - To help offset concerns about the financial costs and uncertain General/Associate and New Member/Convert ratios, it’s recommended to limit the term of all discounts to 2 years.
  - At the end of the discount term, program members and those responsible for approving payment will recognize the full value of CFMA and elect to continue as members
- Can participate in the program for a maximum of 5 years
- Existing chapter members who meet the criteria are welcome to apply however these program members do not increase member growth
The ratio of new vs. converted members should be at least 2:1 (2 new members for every one convert)

Membership growth should be a goal of the program

- Has made a commitment to pursuing a professional career in construction financial management or support service
- Displays a potential to be a leader
- Members are subject to a status review periodically for continued eligibility in the program

Benefits to Program Members

- Mentoring relationships with chapter members who have significant industry experience
- Financial considerations such as:
  - Reduction in chapter dues
  - Discounts on chapter sponsored events
  - Discounts on educational courses sponsored by the chapter
- Building relationships and exchanging ideas through networking with others in the program
- Increased knowledge of the industry

Sample Responsibilities of Program Members

- One individual from the program to serve on the Chapter Board of Directors
- The program members will maintain a page on the local chapter’s website and will be responsible for keeping it updated
- The program members will periodically include a report to the chapter’s Board of Directors and include information for inclusion in chapter publications.
- An update on program activities should be shared at chapter meetings
- Each program member is expected to serve on a chapter committee while in the program
- Attend a minimum of 75% of meetings, 50% of lunch or dinner meetings and must attend a minimum of 2 special activity events (i.e. social, charity, etc.) annually

Structure of the Program

- A chapter mentor or young professionals committee is required to support the program members as well as serve as the main contact for members that meet the eligibility requirements
- Those in the program may operate as a committee within the chapter and may hold events just for members and potential members of the program
• This type of program is a great opportunity for chapter members to mentor those early in their careers
• Chapter leaders should meet periodically with their program members to ensure the program is meeting the needs of its members
• Networking and social events should be a part of the program
• Involvement with all chapter committees should be encouraged and can be made a requirement of being a part of the program
• Program marketing should be done through a variety of channels with a goal of not just reaching chapter members but reaching those professionals in the industry who should be a part of the program
  ➢ Chapter announcements
  ➢ Emails
  ➢ Communication between chapter members
  ➢ Chapter website
  ➢ Social media
Growing and Engaging a Chapter’s General Membership

- Encourage members who are general contractors to provide gentle pressure to their subcontractors to join.
- Whenever your company’s subcontractors come to pick up their checks, talk up CFMA.
- Consider allowing prospective general members attend a chapter meeting for free.
- All chapter members should engage with non-members to attend chapter meeting to encourage them to join.
- Don’t be afraid to talk up CFMA wherever you go (other associations, software user groups, etc.), this should be true for all members of the chapter.
- Encourage associate members to talk up CFMA to their clients and bring them to a meeting.
- Attend meetings at other associations and take a look at their speakers to get ideas.
- Look for opportunities to partner with other industry associations and expand the reach outside of companies who are already familiar with CFMA.
- When one of your members switches companies, contact their previous company to make sure the person taking over knows about CFMA.
- Have an annual new member recruitment contest. Each member who recruits a new members gets an entry into an annual drawing (2 entries for a new general member and 1 entry for a new associate member).
- If your members are spread out over a wide area, consider a remote site where those far from the meeting location can gather to network and view the meeting content.
- And remember – it’s not just the membership committee’s job, it’s everyone’s job.
Engaging Board Members and Holding Them Accountable

- Make sure your President goes to Spring Creek, he/she will bring back ideas and excitement.
- Put your Chapter Admin to work so Board Members get out of their daily grind.
- Mix up the duties of the Board Members and don’t be afraid to ask long standing Board Members to beg off of a committee.
- Ask longstanding board members to step off the board
- Do a strategic planning session with National.
- Have each Board Member assigned to a different committee.
- If they miss more than 3 meetings, they are off the board.
- Having an orientation meeting for new Board Members might be a good benefit.
- Have a retreat for Board members; it will help them become more of a group.
- Have a social event, with strategic planning beforehand, and have it open to general members.
**Employer Buy-In**

- Complimentary online Building Profits sent to the owner of a company would show appreciation and it doesn’t cost anything.
- Relevant articles in Building Profits can be shared with shareholders.
- CONFINDEX could be shared with owner/President of company.
- CPA firms are putting together their own benchmarking with their clients; maybe our regional benchmarking sections could be sent to company owners and board members.
- Try to get other company operations involved instead of just accounting.
- CFMA issues could be reported during company morning huddles so the entire company knows what’s going on in the industry.
Communication with Chapter Members

A sample of software marketing programs used by some of our chapters:

- **Event Brite** – web-based program where you can create events and take payments.
- **Mail Chimp** - web-based program used for regular correspondence such as e-blasts.
- **Club Express** – web-based program used for sending e-blasts, creating events and taking payments.
- **Constant Contact** – web-based email marketing.
- **Box.com** - web-based program for storing documents online.
Duties of a Chapter Administrator

Below is a sample of chapter administrator duties:

- Gather meeting responses
- Attend all chapter meetings
- Staff the registration table at meetings
- Send meeting reminders
- Collect meeting payments
- Sends chapter correspondence
- Maintains the chapter's member and prospect databases
- Create and distribute chapter newsletter
- Respond to chapter inquiries
- Create graphics for the chapter
- Maintain Constant Contact
- Update social media
- Update and maintains the chapter website
- Assist Chapter President with meeting scheduling
- Attend all board meetings
- Handle contract negotiation
- Handle catering details
- Part of the Regional Conference planning group
Promoting the CFM Academy

- Designed for people with 0-3 years of experience in construction finance.
- The course is divided into six online self-study modules:
  - Revenue Recognition
  - Cash Management
  - Project Management
  - Risk Management
  - Contracts/Subcontracts
  - Work-in-Progress
- Each module is approximately 1 hour in length.
- A certificate is given upon the successful completion of the course.
- No CPE credits are received.
- Price:
  - $236 members
  - $575 non-members
**Chapter Health Risk Factors**

The following factors would be indicators of a chapter in trouble and in need of assistance.

- Low meeting attendance
- Infrequent meetings
- Sub-par speakers
- Small Board of Directors
- Lack of succession planning
- The same few people doing everything, year after year
- General and Associate ratio is out of balance
- Lack of participation on National level
- Low retention rate
- No committees
- Zero internet presence (not just chapter website)
- No internet presence
- Lack of advance planning for chapter meetings and events
- Never uses STAR funds
- No strategic planning
- Lack of membership drive efforts, no membership committee
- Doesn’t respond to CFMA HQ (doesn’t answer e-mails, doesn’t participate in Chapter Connection Program, etc.)

A report card/dashboard is being developed of items that could indicate a chapter is not as strong as it could be. Areas that could be an issue for one chapter may not be a measure of health for another so a variety of areas will be measured.
Areas discussed were:

- Not responding to CFMA HQ
  - Chapter could be well run and well-managed but not connected
  - Chapter leadership and members may not get the value from CFMA if they are not aware of what CFMA HQ can provide
  - Without a strong relationship with CFMA HQ a chapter could be at risk if a strong leader leaves

- What is the definition of a struggling chapter?
  - Not retaining members
  - Not growing and adding new members
  - Lack of participation on chapter committees and at chapter meetings
  - Not meeting the chapter’s mission statement

- Growth potential varies depending on where the chapter is located

- Chapters could mentor other chapters

- Board size - this should not be a measure
  - Large chapter would have a larger board
  - Looking at % of membership on board is not useful, for a large chapter the % would be lower than for a small chapter

- Board turnover is a good measure

- Attendance at CFMA conference?

- Some ‘could be’ items that are more fluid

- Low meeting attendance

- Frequency of meetings should not be a measure – meeting less than quarterly should be a red flag

- Submission of chapter benchmarking information should be measure – this is important since some of the measurable data comes from the chapter’s submission.
Chapter Newsletters

A variety of items can be included in a chapter’s newsletter:

- Member spotlight
- Pictures from events
- Upcoming calendar of events
- Registration links to events
- Sponsor logos and features
- Local construction news
- President’s message
- Job postings
- CFMA information
  - Annual Conference
  - Regional Conferences
  - Webinars
  - CFMA education
  - CFMA products
Chapter Leader Hand-Off Policies

The following are suggestions to ensure you have a smooth handoff when you change chapter leadership:

- All files should be stored electronically
  - Access can be granted yearly and separated by need/position.
  - Dropbox, Google docs, Microsoft One Drive are some examples.
  - Have committee chairs store their meeting minutes online as well so they are easily accessible by future leaders.
  - If you have a Chapter Admin, ensure he/she is not the sole custodian of the files in case there is a disagreement and they are terminated.

- Have a 2-year term for chapter leaders so the last 6 months of the term can be used to familiarize the incoming leader with chapter issues to ensure a smooth transition.
  - the Chapter Vice-President can work closely with the Chapter President.
  - the current chapter leader can copy the incoming chapter leader on all HQ emails so they are aware of what is going on in the chapter.

- Create an Immediate Past President committee position so the previous Chapter President is on-hand to help.

- Have one-on-one meetings towards the end of the year.

- Have outlines with key notes and calendar of events prepared to hand off.

- Consider having staggered terms to ensure that chapter leadership is not all completely new
  - having some members with 3-year terms and others with 2-year terms would ensure a staggered transition.

- Have the Chapter Vice-President, together with the Chapter President, chair the final board meeting or event.

- Ensure your incoming Chapter President goes to Spring Creek as they will learn highly effective succession planning tools.
**Expectations of Committee Members**

- Convey expectations and let committee members know what they are in for.
- Have committee descriptions.
- To help with accountability, have a committee charter that is signed by each member that states attendance is expected and has a conflict of interest clause.
- Have each committee meet separately and have the committee chair report back to the board via a short report from each committee chair at board meetings.
- For smaller chapters, having everyone at all meetings would help them know what’s going on in the chapter.
- Assign each board member/director a committee and have them regularly assist the committee chair.
- Consider having a social hour after each meeting as some chapters have seen an increase in attendance.
- Chapter leadership has to learn to let go and delegate to committee members.
- Limit the amount of committee members as some members will feel detached if the committee is too big and there is not enough for everyone to do.
Selling CFMA Chapter Membership to Potential Members

- Joint events with other associations (AGC, NECA, ASA, etc.) are a great way to introduce CFMA to potential members
- Hold a separate event (breakfast, networking, etc.) for just new and potential members
- Have a special membership social event and invite prospects from the industry
- Board members should divide up at all meetings so there is more interaction with potential members and any questions can be answered
- Use PowerPoint slides developed by CFMA HQ to share information on membership
- Highlight member-only benefits such as Building Profits to non-members
- Membership Committee or Board could split up list prospects and personally reach out to them
- Share the value of membership by including a tangible example (something learned from a Connection Café post, at Spring Creek, etc.) so potential members see beyond education and networking
- Get new members engaged right away, ask new members to join a committee
- Include a flyers for a CFMA meeting in subcontractor check envelopes
- Member can include pamphlet and personal note with checks sharing why they value CFMA
- Personally invite potential members and allow them to attend a meeting free of charge
- Allow each member to bring a guest free of charge to any meeting
- Young Professionals/Emerging Leaders Program is a great way to get those early in their career into CFMA