

**Chapter Manual**

***(Updated February 2021)***

1. PARMA Overview

The Public Agency Risk Management Association (PARMA) was established in 1974 for governmental agencies and other nonprofit, tax-exempt organizations to consider, discuss, and exchange ideas for the improvement and functioning of risk management and to assist such agencies and their governing bodies in fostering risk management education, communication, and cooperation.

PARMA is a 501c6 not-for-profit professional association organization incorporated under California state laws. The headquarters office is in Sacramento, California. With six (6) chapters located throughout the state. The chapters operate under the PARMA Tax ID # 77-0312951.

**PARMA’s Mission**

PARMA is dedicated to the professional development of all California public agency personnel with responsibility for risk management, and to the promotion of risk management as a critical component for public agency fiscal health.

**Vision Statement**

PARMA is recognized as the essential connection public agencies need to manage a broad spectrum of risk in an ever-changing environment.

**Strategic Goals**

PARMA maintains a formal, ongoing strategic planning approach to determining the future direction of the association. While PARMA provides a host of programs and services as part of its ongoing operations, the strategic plan determines what must be done to create a successful future as expressed in the long-term goals.

PARMA and its chapter officers are essential to determining its strategic goals. The leadership gathers every spring to develop or review the strategic goals of the association. The chapter officers are key to that process in helping PARMA gauge the direction and purpose of the association to remain relevant to our members and to implement the goals for the membership at the local chapter level.

1. PARMA Governance

**PARMA Governance**

PARMA and its chapters all operate under a single non-profit taxpayer identification. The PARMA Board of Directors is the governing body of PARMA and its chapters.

**PARMA Board Composition**

The PARMA Board of Directors consists of not less than five (5) nor more than seven (7) members plus the Immediate Past-President. Directors and officers are elected to serve two (2) year terms. The director terms are staggered. Sitting directors select the officers.

**PARMA Board Elections**

PARMA solicits candidates for consideration per the *Board of Directors Nominations & Elections Policy*. The outcome of PARMA Board elections is announced during the PARMA Annual Business Meeting. PARMA has a highbred election method that incorporates electronic balloting of its members for contested elections. In the instance when there are equal candidates to open seats, the Board of Directors confirms the recommendation of the nominating committee and no balloting takes place.

**Chapters**

To carry out PARMA’s purpose, the Board of Directors has established “chapters” based upon the geographic distribution of its members. Chapters are formed by action initiated by the Board of Directors or by action of the Board following a request by members who have demonstrated the feasibility and reasonable chance of success of a chapter. Chapters will be established and operate in accordance with policies, procedures, and guidelines as may be created by the PARMA Board and as amended from time to time.

The PARMA Board of Directors reserves to itself the power to disapprove, annul, or cancel any actions of a chapter that are inconsistent with such expressed purposes.

**Chapter Officers**

The Board of Directors appoints chapter officers or agents as it may deem desirable, and such officers shall serve such terms, have such authority, and perform such duties as may be prescribed by the Board of Directors.

Presently the chapter officers are the Chair, Vice Chair, and Secretary/Treasurer.

Terms of office begin after the Annual Conference or immediately following the PARMA Board confirmation, whichever comes first. Each officer’s term duration coincides with the Annual Conference.

**Chapter Steering Committee**

Chapters are encouraged to create a Steering Committee to assist the chapter officers with event planning details. The Steering Committee can be tasked with identify potential topics and speakers. This also provides the chapter with an opportunity to identifying potential future chapter officers.

The Steering Committee is chaired by the chapter chair. Its purpose is to assist the chapter officers with setting the annual meeting schedule and topics.

The programs for your membership meetings are important. Each meeting should give the members information that is timely and useful.

1. Chapter Resources

**Chapter Officer Communications**

The best resource for chapter officers is communicating with other chapter officers about success, trials and challenges. To assist with chapter officer communication, PARMA has established a listserv. Once appointed as an officer, your address is automatically added to the listserv.

The listserv address is: [PARMAchapterleaders@googlegroups.com](mailto:PARMAchapterleaders@googlegroups.com).

Posting to the listserv is very easy. Simply use the email address referenced above in your email “To” line. When you hit send, all chapter officers will receive your email and can respond.

**Sample Documents & Policies / Procedures**

PARMA has also setup a share drive that is the *Chapter Resource Toolbox* that provides sample documents as well as PARMA’s policies and procedures. Following is a list of some of the resources available on the *Chapter Resource Toolbox*.

* PARMA Logo
* Chapter Event Planning Guide
* Marketing Flyer Templates
* Session Idea Books
* Event Activity Reporting Form
* Treasurer Report Form
* Chapter Event Marketing Protocol
* Square Setup Instructions
* Travel Expense Policy & Reimbursement Form
* Chapter Financial Policy
* Chapter Scholarship Policy
* Awards by Chapters Policy
* PARMA Scholarship Policy

*Chapter Resource Toolbox* access: [Click here](https://www.parma.com/chapter-officer-resources), or copy and paste the following in your web browser:

<https://www.parma.com/chapter-officer-resources>

**Event Marketing**

PARMA staff is available to assist with your chapter event marketing. Simply email your event details to [communications@parma.com](mailto:communications@parma.com). Your event details will be email marketed to PARMA members as well as added to the PARMA website calendar and social media calendars. We can also setup your event registration (see details below).

Chapters are required to use a PARMA approved event marketing template. If available, the PARMA staff will assist with creating your marketing flyer. To request assistance with your marketing flyer, please contact to Gloria Peterson, Executive Director at [ed@parma.com](mailto:ed@parma.com).

**Virtual Events**

PARMA will provide access to either or Zoom account (recommended for smaller group meetings of less than 25ppl) or Go-to-Webinar account (recommended for larger webinars 25+ ppl). However, chapter leaders are responsible identifying a volunteer from the chapter to facilitate the meeting. If you would like to use the PARMA Zoom or Go-to-Webinar account for a Chapter virtual event contact Gloria Peterson, Executive Director at [ed@parma.com](mailto:ed@parma.com).

**Event Online Registration Option**

PARMA will setup registration for your event using the Constant Contact event module. With a coordinated effort, we will have your event registration setup in conjunction with the completion of the marketing materials. Simply include the registration details in your request to [communications@parma.com](mailto:communications@parma.com). The minimum details needed include the following:

1. Official Event Name
2. Event Date & Times
3. Meeting Location (Virtual events require a URL.)
4. Chapter Contact with preferred contact (e.g., email or phone)
5. Registration Fees (including sponsorships, if applicable.)

*Note: There will be no cost for the PARMA public entity members.*

1. Payment methods accepted (pay at door, credit card, or check)
2. Registration Limit (If applicable)
3. Registration Deadline
4. Frequency in which you wish to receive registration updates *(At a minimum we will provide that to you one week before the event and the day before the event.)*

Processing fees will apply to paid attendees and sponsorships using this method. You can let us know if you want to include sponsorship sign ups in the online registration for your event.

Following is language direct from Constant Contact that outlines the fee amounts.

*How the WePay Transaction Fee is Applied within your Account*

*As outlined in the Benefits section above, a 2.9% + $0.30 transaction fee is applied to each WePay charge you take from a customer. By default, the fee is subtracted from the amount that you charge.*

*For example: The cost to attend your event is set at $100. Your customer pays $100 through the WePay account you've set up. The money that you receive from this transaction is $96.80. That is based on the $100 payment, minus the $3.20 WePay transaction fee.*

*Fees collected for your event will be provided to the Chapter Treasurer via check issued by the PARMA office. This will take place after the event has concluded. Therefore, you should also consider whether this will present a cash flow issue for your Chapter.*

**Chapter Liaisons**

Each Chapter has a Board liaison(s) assigned to guide the Chapter officers. The current liaison(s) are as follows:

* Bay Area – Steve Schwarz
* Central Valley – Tanesha Welch & Catherine Jones
* Gold Coast – Chuck Pode
* San Diego / Imperial Valley – Larry Costello
* Southern California – Paul Zeglovich & Jeff Rush
* Sacramento – Karen Bianchini

**Volunteer Opportunities**

One goal of PARMA is to identify the next generation of leaders to carry the association into the future. A risk management professional interested in making a difference and helping to shape the future of the profession should consider putting their personal skills to work.

PARMA chapters are an important resource for identifying members who have the desire and availability to volunteer. There are so many areas that can use assistance; simply match each volunteer with a task that is at a level that supports their success. Sample volunteer opportunities include serving on a steering committee, speaking, making phone calls about an upcoming meeting, helping to set up for a meeting, and outreach to potential new member entities or associate members.

PARMA also assigns committees and task forces that work towards the association achieving its strategic goals. Members of PARMA are encouraged to participate in these committees. The current committees are:

1. Conference Planning
2. Education
3. Outreach
4. Technology
5. PARMA Staff

**Executive Director, Gloria Peterson**

The Chief Executive Officer is the administrator of the association. Her responsibility is to manage the day-to-day operations of the association. She implements programs for the betterment of the association. The Executive Director and PARMA President are the primary spokespersons for the association.

**Director of Finance, Denise King**

Works closely with leadership and Certified Public Accountant (CPA) to monitor financial activities within the association to guarantee that all projects and activities are keeping within the Board approved budget. Acts as an advisor for all short and long-range investment plans.

**Membership, Allie Johnson**

Provides administrative support, processes dues billing, event registration, payment processing and monitors data integrity.

**Communications Team, Sarah Austin, Jonathan Flom, and Kate Hicks**

Works closely with leadership to coordinate communication of association activities via the website, social media outlets, press releases, and electronic newsletters.

**Convention & Events Managers, Becky McGuire**

Responsible for event planning and logistics for PARMA Board meetings, the Annual Conference and educational activities of the association.

**Exhibit / Sponsor Manager, Nicole Agnone, Amenda Yang**

Responsible for vendor relations as it relates to the PARMA Annual Conference including exhibition and sponsorship management.

1. PARMA Board of Directors

The PARMA Board of Directors is elected to serve the PARMA membership. Some of the functions of a PARMA Board Member include the following assistance to chapters:

1. Explain in clear terms PARMA’s current and new programs and ask members how the association can help chapters participate in reaching those program goals and objectives.
2. Determine whether the chapter has any serious problems. This is your opportunity to ask questions or ask for assistance.
3. Keep in touch with various PARMA board members by phone at least once a month to inform them of the chapter’s activities.
4. A main priority of all PARMA board members is membership recruitment and retention. Of course, membership growth should be continuous. PARMA board members and staff are available to assist the chapter officers as they strive to achieve their membership goals and monitor their progress in achieving them.
5. Get acquainted by contacting your PARMA board members or PARMA staff as soon as possible. Discuss a time to have them visit your chapter and be put on the agenda.
6. PARMA Committees & Purpose
7. Executive:

Composition: PARMA Officers.

Purpose: Oversees PARMA’s bylaws, policy, finance and operating procedures.

1. Conference Planning

Composition: The chair is the vice president of PARMA. Participants include the PARMA Board, chapter chairs and a representative from each of PARMA’s titanium and platinum sponsors.

Purpose: Identify the educational content for the Annual Conference that meets PARMA’s objectives and goals, provide input to the overall Conference schedule, theme and social events.

1. Education & Professional Development

Composition: Chaired by a member of the PARMA board, members are selected from amongst the membership.

Purpose: Identify available resources, educational and networking opportunities to further PARMA’s mission as it relates to professional development. Select and manage the sessions designated for continuing education (CE and MCLE) offered at the Annual Conference. Select and manage the sessions for which chapters can offer CE.

1. Outreach

Composition: Chaired by a member of the PARMA board and composed of additional members, typically chapter officers.

Purpose: Develop outreach strategies to influence the perceived value of risk management to public agencies, engage future risk management professionals, grow and maintain membership and foster networking opportunities among risk management professionals.

*Membership Sub-Committee*

Purpose: To promote membership in PARMA by identifying the value of PARMA to the risk management community and identifying strategic alliances that will help build membership.

*Communications Sub-Committee*

Purpose: To guide the association's activities as they relate to communications to and amongst PARMA members on the activities of PARMA as well as the risk management community.

1. Technology

Composition: Chaired by a member of the PARMA board and composed of additional members.

Purpose: Identify technology that will assist PARMA with providing its members with convenient, flexible access to education, leadership training, networking and resource opportunities. Also, identify technology trends that impact the risk management community and provide resources and perspectives to members about these emerging trends.

1. PARMA Membership Categories

#### PARMA shall be comprised of different categories of membership. The categories of membership are:

1. **Public Entity** members shall be any public agency as specified in the California Government Code or similar law in other states. Public Entity members will have a single vote. The entity maintains the membership, which is non-transferable. A primary contact shall be designated for voting purposes. All permanent direct employees within the member entity are entitled to hold elective office and shall receive all member benefits.
2. **Associate** members shall be those businesses, which supply goods or services to public entities. Associate members shall not be entitled to vote nor to hold elective office.
3. **Life Member** may be granted to risk management professionals who have rendered efforts on behalf of the risk management profession or PARMA that merits special recognition. This membership shall be confirmed by the affirmative vote of at least two-thirds of the current PARMA Board of Directors. Life Members will not be subject to membership dues, are entitled to vote and may be eligible to hold elective office, as further defined in policy.
4. **Retired** members are those individuals who previously were employees of a Public Entity in good standing. Retired members are not entitled to vote nor to hold elective office.
5. Chapter Locations

PARMA has 6 chapters throughout California. Including: Bay Area, Gold Coast, Central Valley Sacramento, San Diego Imperial Valley and Southern California.

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1. The Effective Chapter Officer

Your attendance at chapter meetings is necessary. The chapter officers direct the affairs of the chapter. The chapter officers should meet on a regular basis and should be notified by the chapter Secretary at least **7 days** in advance of a meeting and send a meeting agenda. If an officer is unable to attend, the Chapter Secretary should be notified, stating the reason for the absence.

At the officer meeting, you will be called on to report about recent activities assigned to you. You will also be called upon to assist with compliance of PARMA chapter policies and directing the affairs of your chapter through your discussion and vote.

As a chapter officer, you may be asked to be the chair of a committee. Committees meet during the year to work on various projects and report plans to the board for approval.

Your presence may be needed at state PARMA functions. Being an officer includes attendance at the Annual Conference, Annual Conference planning meeting and other leadership conferences, regional meetings and/or other scheduled functions.

Plan ahead and encourage others from your chapter who possess leadership qualities to attend. Upon your return from these meetings, make certain to give an informative, complete and accurate report to other members.

1. Chapter Chair

The PARMA Chapter Chair holds an important position. The Chapter Chair is the PARMA spokesperson at the chapter level. The Chair must stay abreast on the association’s goals, benefits and services.

**Chair Position Description**

The Chair is the chief officer of the chapter. This role includes supervising the business of the chapter as well as administering PARMA policies. Other duties include:

1. Provide leadership and overall direction.
2. With the assistance of other Chapter Officers, establish chapter objectives for the year.
3. Preside over all meetings.
4. Call and conduct chapter meetings.
5. Identify potential new chapter officers.

**Outline for Action**

Upon becoming a Chapter Chair, there is a course of action that should be followed:

1. Plan meetings with the chapter officers to set goals for the coming year.
2. Organize the chapter to meet those goals and utilize the maximum number of members on committees.
3. Assist in the appointment of committee chairs as well as the delegation of responsibility.
4. Assist the officers and committee chairs by making sure they understand their positions and individual responsibilities.

**Tips for a Productive Meeting**

A chapter meeting should be of value to the PARMA member. If they feel it was worth their time, you will see them at the next meeting. Make certain there is educational and professional value built into your meeting.

All of the members should be warmly greeted at meetings and be presented with the opportunity to introduce themselves. Provide name badges and copies of agendas to each attendee upon check in.

Provide members with time and opportunity to network, ask questions and the chance to participate during the meeting.

The chapter officers and designated volunteers will conduct an annual plan meeting at least 6 months in advance and copy a calendar of events to give to members at each meeting.

**Planning the Agenda**

Chapter meetings shall include a presentation by a speaker and provide business information. Business information should be limited to announcements of special events and action items about on-going projects.

1. Chapter Vice Chair

The chapter Vice President is an important position for a successful chapter. Responsibilities include:

* Under the general direction of the chapter chair, develop meeting topics & speakers.
* In the absence of the Chair, conduct chapter meetings.
* Work with the Secretary/Treasurer on chapter surveys and needs assessments.
* Assist the Secretary/Treasurer if needed during meeting registration.
* Performs other duties as may be required by the Chapter Chair.
* Receive copies of your treasurer’s quarterly reports.
* Do not allow non-officers to take on responsibilities of the chapter officers.

**Vice Chair Position Description**

1. Preside at meetings in the absence of the Chair.
2. Coordinate and direct the activities of the committees on behalf of the President.
3. Call for committee reports as needed.
4. Assist the Chair and the Secretary / Treasurer in the development of an agenda.

**Role of the Vice Chair**

Whether big or small, no chapter can function without committees or volunteer leadership. A suggested role for the vice chair is to identify volunteers and match those volunteers up with opportunities that meet their talent and availability.

1. Chapter Secretary / Treasurer

The Secretary / Treasurer maintains the official records and history of the chapter and manages the funds of the chapter.

**Secretary / Treasurer Position Description**

* Keep current on PARMA state activities that concern the chapter.
* Assist the Chair and Vice-Chair in organizing and planning meeting agendas.
* Send in membership changes to PARMA.
* Develop a proposed annual budget with the chapter officers and request approval from the PARMA Board of Directors.
* Report to PARMA the financial activities to PARMA using the PARMA approved form located in this manual.
* Provide a post summary meeting report to PARMA using the PARMA approved form located in this manual.
* Pay the chapter bills and ensure all amounts paid are accompanied with the proper receipts.
* Collect money at chapter functions, make deposits and reconcile the chapter accounts.
* Be familiar and guarantee compliance with applicable PARMA policies, specifically the *Chapter Financial Guidelines Policy*, available in the chapter resources section of the PARMA website located in the Member’s only area.

1. Chapter Financial Guidelines Policy

*Amended March 2015*

*Re-written 5.13.2017*

1. **PURPOSE**

To establish a uniform financial policy for PARMA chapters.

1. **APPLICABILITY**

This policy applies to all chapters of PARMA.

1. **FISCAL YEAR**

The fiscal year (FY) is July 1 – June 30.

1. **BANKING PROCEDURES**
2. Each chapter will establish and maintain a checking account in a bank or financial institution using PARMA’s tax i.d. number, **77-0312951.** Each account should be a non-profit account.
3. The chapter Chair, Vice Chair and Secretary-Treasurer and the PARMA Executive Director should be the authorized signatories on the account. Electronic access should be obtained for the PARMA Secretary-Treasurer and Executive Director on every chapter bank account. Passwords and ID’s should be forwarded to PARMA Secretary-Treasurer and Executive Director.
4. **BANK ACCOUNT BALANCE**
5. The bank balance should not exceed a maximum of five (5) thousand dollars.
6. If the account balance exceeds the maximum balance limit, the chapter has 90-days to propose its intentions to use the surplus balance. Examples of acceptable surplus fund distributions would be future event expenses or scholarship distributions.
7. If the chapter has not reported its plans for the surplus bank account balance, PARMA will issue a 30-day written notice to the chapter requesting a plan.
8. If the chapter fails to submit a plan within the 30-day notice period, PARMA will transfer the surplus funds to the PARMA account.
9. **ANNUAL BUDGET DEVELOPMENT**
10. Chapters will establish an annual operating budget that coincide with the fiscal year.
11. Proposed budgets are due to the PARMA Board of Directors on or before July 1.
12. The PARMA Board of Directors will review and act on the proposed budget.
13. Budgets should include, but are not limited to: event registration income, sponsorship income, event related expenses and scholarship expenses. A sample worksheet is provided by PARMA.
14. **REPORTING PROCEDURES**
15. Each Chapter Secretary-Treasurer has a direct reporting responsibility to the PARMA Executive Director.
16. Monthly bank statements should be provided to the Executive Director via e-mail at [ed@parma.com](mailto:ed@parma.com).
17. After each chapter meeting a report should be provided to the PARMA Executive Director including # of attendees, revenue collected and costs incurred for meeting or event.
18. Chapter financial reports should be confidential and shared with chapter officers and PARMA Board of Directors. Any requests for financial information from the membership should be requested in writing addressed to the PARMA Board of Directors.
19. **EXPENDITURE GUIDELINES**

Expenditures noted as non-authorized in this policy must be submitted to PARMA Board of Directors for advanced approval. Approval can be sought through the annual budget approval process.

1. Authorized expenditures for PARMA chapters:
   * + Cost of meals for chapter meetings;
     + Rental of facility for chapter meetings;
     + Cost of each speaker’s lunch;
     + Cost of mailing of notices for chapter meetings and other related items necessary for chapter meetings such as copying, tickets, stationery, and envelopes; and, Speaker gifts not to exceed $25.
2. Non-authorized expenditures:
   * + Mileage/travel expenses;
     + Conference registration @ PARMA for promotional purposes;
     + Speaker honorariums;
     + Scholarships for chapter officers; and,
     + Capital equipment such as computer, printers, etc.
3. Conference Scholarship Award by Chapters

**I. PURPOSE**

To establish a uniform policy for PARMA Chapters to award annual conference scholarships.

**II. APPLICABILITY**

This policy applies to all Chapters of the Public Agency Risk Management Association.

**III. ELIGIBILITY**

1. Chapters who have a bank account balance of no less than *$2,500* will use the excess funds to award a scholarship to a Chapter member. Chapters will specify the maximum dollar amount of the scholarship prior to awarding the scholarship.
2. The scholarship amount shall be limited to annual conference registration, room accommodations at the lowest priced option for Conference Host Hotel for a maximum of three room nights. The Chapter will also reimburse travel round-trip at the IRS rate mileage and/or airfare, not to exceed $600. The Chapter should consider written requests in which extenuating circumstances are presented that would justify travel expenses to exceed the maximum dollar limit. Such requests should be addressed to the Chapter Treasurer.
3. The scholarship shall not be named after any individual unless it is in memoriam and approved by the Board of Directors.
4. Only public entity/PARMA members of the issuing Chapter, including Chapter officers shall be eligible for the scholarship.
5. Applicants must use the Chapter Scholarship Application form available on the PARMA website.
6. The awarding of the scholarship for public entity members excluding chapter officers shall be determined by a panel of three public entity PARMA members which shall include one (1) Chapter officer. Once identified, the PARMA Board of Directors should be notified of the scholarship review panel participants.
7. The awarding of the scholarship for any Chapter officer must be approved by the PARMA Board of Directors.
8. On or before October 31 of each year, the Chapter shall notify the PARMA Board of Directors as to the recipient of the scholarship.
9. The Scholarship Application will include language that should the winner of the scholarship not attend the annual conference for any reason, the awardee will reimburse the Chapter in full for all scholarship payments made by the Chapter to the awardee.
10. The Scholarship Application shall include indemnification language that absolves the Public Agency Risk Management Association, its officers, chapters, chapter officers, agents and volunteers from all liability involving the awardee’s participation during and/or in travel to and from or in conjunction with the annual conference and will be signed by the applicant.
11. All documentation involving the awarding of the scholarship including but not limited to: the scholarship application, payment/reimbursement and confirmation of the winner’s attendance at the annual conference shall be submitted to the Chapter Treasurer no later than thirty (30) days of the conclusion of the conference.
12. The Board of Directors may, at any time, revoke the Chapter’s ability to award scholarships under this or any other PARMA policy.

**IV: EFFECTIVE DATE:**

The effective date of this Administrative Policy is May 13, 2017 (Board Approval Date).

1. Awards by Chapters

*Policy Effective 5/13/17*

1. **PURPOSE**

To establish a uniform policy for PARMA chapters to award PARMA annual conference registration certificates and one-year memberships.

1. **APPLICABILITY**

This policy applies to all chapters of PARMA.

1. **AWARDS**
2. Each chapter will be provided by PARMA two (2) free PARMA annual conference registrations and two (2) one-year memberships to be awarded at a chapter event.
3. Certificates will be issued to each chapter during the spring PARMA annual conference planning meeting.
4. Annual conference registration certificates should be issued no later than December 31.
5. **ELIGIBILITY**
6. Eligible candidates must be a public entity employee/PARMA public entity member and shall have attended at least two (2) chapter meetings within the immediate 12 (twelve) months prior to the date the certificate was awarded.
7. Eligible candidates must confirm their desire to be entered in the drawing.
8. Chapter officers and PARMA board members are not eligible to win.
9. At the time of award, the certificate must be validated by a chapter officer and must include the certificate holder’s name and the entity for which they are employed.
10. **ANNUAL CONFERENCE CERTIFICATE**
11. To redeem the annual conference certificate, the certificate must be submitted at the time of conference registration.
12. If the certificate holder has already registered, a refund may be requested but shall only be paid to the person/entity that paid the registration.
13. The certificate holder or anyone from the public entity may not transfer the certificate to another person without the permission of a chapter officer who must then notify the conference chairperson of the change (see #IV for eligibility).
14. If, for any reason, the certificate holder is unable to use the certificate, notification must be given to a chapter officer. Failure to do so shall disqualify the certificate holder from being awarded a free registration in the future.
15. The certificate shall include indemnification language that absolves PARMA, its officers, chapters, chapter officers, agents and volunteers from all liability involving the Awardees participation during and/or in travel to and from or in conjunction with the conference and be signed by the applicant.
16. PARMA Chapter Event Planning Guide

This is an overview of how a PARMA Chapter event can create an interest in both PARMA and the local Chapter. This information was compiled to assist the Chapters with planning a successful event as well as to maintain consistent branding of PARMA.

Step One: The Chapter should create a timeline of what needs to happen to make an event successful.

**General Tips**

1. Begin preparing six to eight months in advance of an event to ensure plenty of time for proper planning of a successful event.
2. Consider creating a planning committee. Ideally, two leaders with event planning experience should oversee the event.
3. When choosing a date, consider the time of year, especially if the event is to be held outside. Weather can be an issue.
4. Consider the holidays or other local events for non-conflicting dates as calendar conflicts can result in a poor turnout, no matter how well planned the event.

Step Two: Select the Meeting Venue

**Venue/Location Tips**

1. The venue size is going to vary depending on the historical size of each Chapter event.
2. At least four to six months prior to the event, contact the venue to determine the availability of the venue and meal and beverage selection. Select two to three options to determine pricing.
3. When selecting a venue consider the following:  
   1. Is it centrally located for the best possible turnout;
   2. Does it require a non-refundable deposit;
   3. Are the acoustics a challenge for insuring your attendees will hear the presenter? It’s suggested that if having it a restaurant that you request to see the space on the same day of the week and relative time that your event will take place. This will give the planner an idea of noise level and other potential logistical challenges such as parking, etc.
   4. Does the venue have audio / visual equipment available?
   5. Are there any height restrictions that may prevent a screen from being used?
   6. Will your event be large enough to require a microphone for presenters? If yes, what is the cost to rent PA system for speaker and master of ceremonies (MC)?

Step Three: Establish your meeting agenda.

**Educational Program Development Tips and Continuing Education Credit**

Use your planning committee to help develop topic and speaker ideas important to your members. Resources that can be arranged by PARMA are:

* + Chapter Session Idea Portfolio – The PARMA Education Committee creates a session idea portfolio on an annual basis. The portfolio is available on the PARMA Chapter Leaders google drive. The portfolio contains sessions for which PARMA can offer continuing education credit (contact hours). The portfolio can be used “as is”, meaning you should directly contact the speaker listed in the portfolio. Speakers have agreed to speak based on availability (some travel restrictions may apply). Some speakers in the portfolio are employed by firms with regional offices; therefore, although the original speaker may not be available for travel, a representative from a local office may be able to step in. The portfolio may also be used to generate ideas where you then tailor the content as desired and secure your own speaker.

PARMA is not an approved MCLE provider, so chapters must find their own local partner to review and approve MCLE credit if desiring to offer this option. Many local attorney firms are MCLE providers and would be happy to partner with a chapter in sponsoring credit for a session.  MCLE credit is the continuing education credit for attorneys and paralegals. Offering MCLE credit is a value-added service that can be a source of revenue (charging a fee for attendance) or a way to increase attendance.

If you want to offer CE certificates for a session, you must contact the Education Chair in advance of sending any meeting publication or meeting notice in order to verify that the session qualifies for credit, so certificate arrangements can be made (which can be downloaded after the event), and so documentation can be coordinated. A sign-in sheet must be obtained and sent to the Education Chair for CE documentation. PARMA must keep documentation of sessions for audit purposes.

* + PARMA President
  + Invite a local public official, state legislator, congressman – this could be a good draw if there is a hot button political issue impacting your geographic area.
  + Platinum Sponsors offer an array of training programs that the PARMA staff can help the Chapters coordinate scheduling and determine available training topics.

Step Four: Determine your overall meeting costs and set your pricing structure.

**Registration Pricing Considerations**

Chapters typically try to get sponsorships, either for the whole year, or to sponsor one chapter meeting. This is intended to pay or offset some of the cost for public entities attending meetings. Each Chapter bases sponsorship and registration fees on dollar amounts needed to cover the meeting costs.

PARMA does not suggest pricing; however, the goal of each Chapter should be to bring in enough revenue through sponsorships to either eliminate or reduce the costs to PARMA’s public entity members.

Consideration: When considering sponsorship structures, be mindful that having a sponsor of a single day event speak during that event may not always give the best impression of impartiality.

Step Five: Start spreading the word.

**Marketing Resources**

Marketing approaches should be multi-pronged incorporating mailing, email and phone calls. The PARMA office help is available. Contact information:

PARMA  
One Capitol Mall, Suite 800  
Sacramento, CA 95814  
Phone: (844) 467-2762  
Fax: (916) 444-7462

1. Use PARMA Designed Template Flyers – Event promotion templates have been designed by staff to insure PARMA brand consistency. Please provide the necessary meeting details, such as, when, where, speakers, cost to attendees, and sponsorship costs. Promotion content should be emailed to [ed@parma.com](mailto:ed@parma.com) so that staff can adapt the flyer templated to your specific event information.
2. PARMA maintains active and potential members marketing lists. This list is available for our Chapters marketing use too, simply request this information by email [membership@parma.com](mailto:membership@parma.com).
3. Email will be used as a supplement flyer distribution or as the main source of marketing.
4. It is recommended that Chapters consider creating a calling tree to make personal contact with members of your Chapter and past attendees. It has been found that *repeated* contacts and reminders to attendees prior to the event will result in better attendance.

**Registration Incentives**

Consider incentivizing attendees to register early by conducting a door prize drawing. You can approach local business or sponsors for door prize donations. Drawings can be used to keep the “buzz” going during the meeting. Door prize ideas: Free training classes, vendor prizes and restaurant or general gift cards.

Step Six: Wrap things up.

**Post Meeting Reporting**

After each meeting, please provide the PARMA office with a completed Chapter Meeting Summary Form, available on the Chapter Leaders google drive, and a complete listing of attendees with contact information. PARMA will use this information to update its database as well as conduct outreach efforts to attendees who are not yet a member of PARMA.

1. Membership Growth

Your chapter will grow, and you will have a successful year if you observe the following:

1. Strongly encourage members to bring prospective members to the meetings.
2. Set a goal for membership in the chapter during your term in office. (Suggest a specific number and assign each committee member a minimum goal.)
3. Make a list of prospective members in your area.
4. Present the completed list to the chapter members. Chances are that some of the members know prospective members and will help to enroll one or more of the members on the list.
5. **Recruiting never ends!** Every member should be equipped to tell all prospective members what the association is about and what the chapter is doing. Unless it is clear as to why a member belongs, he will never be able to recruit a new member.
6. The Chapter should offer some sort of incentive to members who solicit new members. For example, your chapter may sponsor a worthwhile program. Invitations should go out to non-members.
7. Enthusiasm is contagious! If you, as a chapter officer, are enthusiastic about membership growth, it will help others to become enthusiastic about it.
8. Keep your chapter “growth minded” because each member adds strength to PARMA. In addition, as PARMA grows, it will become more and more capable of dealing with the problems that face today’s risk management professional. Everyone benefits when a new member joins.
9. Chapters also benefit from new members because the new member can add fresh ideas to the chapter events.
10. Associate members who are in the field every day are a great source for new member sign ups.
11. Membership Campaigns

Planned membership campaigns in your chapter can be very effective if the chapter officers are excited about them. Here are some suggestions for membership campaigns:

**Plan A --** Divide the members into two or more teams. Appoint a captain for each team. Have a contest to see which team can enroll the newest members by a certain date. Have a reward for the winning team furnished by the losing team(s).

**Plan B --** Appoint a committee to work toward a new member goal and ask them to:

* Establish a list of prospective member in the chapter area. Use the existing membership list as a resource to identify prospective members.
* Phone or visit the key contact or risk management personnel of the public agency and acquaint them with the advantages of being PARMA members.
* Draft and send out letters of “greetings” to prospective members with informational materials included and a date to call them back.

**Plan C** – Create an incentive program for members to help recruit new members. One such idea is the “One Member Can!” campaign in which the recruiting member can earn points for every member he or she recruits and the points accumulate towards earning a prize. Following is an example of such a points system:

***When you recruit a new Regular or Associate PARMA member***

*When you accrue Six Points, you will receive a new iPad. Recruit a new member and you will receive your points upon their complete payment of 12 months of dues.*

*Be sure to get PARMA Board approval for your incentive plan.*

**Plan D** – Identify up to ten prospects in your chapter area and concentrate your efforts on getting them to join. You can invite them to attend a Chapter event at no charge to see what your chapter has to offer.

Sample of these recruitment ideas can be shared through the Chapter Leadership listserv by simply e-mailing them to [PARMAchapterleaders@googlegroups.com](mailto:PARMAchapterleaders@googlegroups.com). If you need a sample, then feel free to ask staff or post a message through the listserv. You may be pleasantly surprised at what your fellow leaders are willing to share.

**APPENDIX I**



Chapter Treasurer Report

Chapter

Date of Report

Current Checking Account Balance

**Account Activity**

*Please list all account activity since the last treasurer’s report was submitted.*

Date Last Treasurer’s Report

Submitted

Checking Account Balance on

Date of Last Report

Total Deposits

Total Payouts

**Bank Statement**

*Please submit a copy of your latest Bank Statement with this report.*

**Your Email Address**

*Please send this report to:*

PARMA

1 Capitol Mall, Suite 800

Sacramento, CA 95814

or

[ed@parma.com](mailto:ed@parma.com)

or

fax: 916-444-7462

**APPENDIX II**



Chapter Meeting Summary

Chapter \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Meeting Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Meeting Location \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**ATTENDEE SUMMARY**

Total Number of Attendees

**Breakdown of Attendees**

*Out of your total attendees, please enter the number from each of the following categories:*

Public Entity Attendees

Associates/Vendors

Speakers/Guests

No Shows

*People who registered in advance*

*and did not attend the meeting*

**MEETING FINANCIAL SUMMARY**

**Income**

**Attendee Payments**

Please enter payments from all paid attendees

**Payments Pending**

Please enter any payments owed but not

received yet here. If no payments are pending

please enter 0 here.

**Sponsorship Income**

Please enter any income from sponsorships

here. If no sponsorship money was collected,

please enter 0 here.

**Other Income**

Please list additional income from other than

registration or sponsorship here.

**Expenses**

*If you did not incur fees for all of the below, please enter a 0 in the appropriate field.*

**Room/Facility Rental Fees**

**Food and Beverage Fees**

**Equipment Fees**

**Gratuities Paid**

**Additional expenses (total)**

If you incurred additional expenses

in a category not listed above, please

enter the total for those expenses here.

**Additional expenses (description)**

Please list here what your

additional expenses were.

**Additional documents**

*Please include any additional relevant documentation.*

**Your Name**

**The office you hold in your chapter**

**Your Email Address**

*Please send this report to:*

PARMA

1 Capitol Mall, Suite 800

Sacramento, CA 95814

or

[ed@parma.com](mailto:ed@parma.com)

or

fax: 916-444-7462