

2018



HOW TO START AN APMP CHAPTER

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INTRODUCTION AND QUICK FACTS

The Association of Proposal Management Professionals® (APMP®) is a non-profit membership organisation founded in August 1989 and dedicated to supporting our members to develop the skills, knowledge and experience they need to learn, develop and succeed.

The Association began with 28 charter members in the United States and today has more than 8,200 members worldwide.

APMP members include individuals and corporations that specialize in the following disciplines:

- Proposal, bids, and tenders
- Business development
- Proposal management
- Capture, sales, and competitive intelligence
- Writing, editing, graphic design, and proposal consulting

The first APMP chapter, Valley of the Sun (Phoenix, AZ), formed in July 1991. Most APMP members affiliate with one of the Association's 26 global chapters. For a complete list of APMP Chapters, please [click here](#).

APMP grows its membership primarily through the following channels:

- APMP Certification
- Bid & Proposal Con (held annually)
- Corporate Member Recruitment
- Local Chapter Recruitment

This guide serves a dual purpose. It offers guidance on how to start a new APMP chapter and provides tips and guidelines for keeping existing chapters active. If you have additional questions, please contact APMP staff or a member of the APMP Board of Directors. Read about the [APMP Board of Directors](#) and [APMP Staff](#).

START AN APMP CHAPTER

WHY START AN APMP CHAPTER?

APMP chapters generally start when proposal professionals want to share best business practices on a regular basis with others in their area. Often, a chapter begins when just a few professionals in the same geographical area decide they want to meet regularly to promote education, networking, and collaboration in all parts of the proposal development lifecycle. Chartering a new APMP chapter takes work—but it offers great opportunities for leadership, professional development, and networking with like-minded proposal professionals.

GETTING STARTED: HOW TO START AN APMP CHAPTER

Before you prepare your *APMP Chapter Petition* packet, your chapter leadership should follow these steps to help you Organise an APMP chapter.

Step 1: Identify Chapter Members – A minimum of 15 members must be interested in forming the chapter. While only 15 members are required, it is best to expand your prospect list beyond that number to ensure that you have 25. Be sure to include members from multiple companies as we've found chapters that depend on membership from one or two companies historically have a much higher likelihood of failure.



Step 2: Identify Chapter Officers – Each chapter must identify a minimum of two-chapter officers before submitting its *APMP Chapter Petition* packet. The two positions that must be filled are a Chapter Chair and a Secretary/Treasurer. The Chapter Chair should plan to attend APMP's annual Bid & Proposal Con.

Step 3: Meetings – Each chapter must hold a minimum of four-member meetings annually. These meetings may be live, via conference call/webinar, or a combination of both. Live event meetings can be held in a member's office or in a hotel. Teleconference meetings can be held using APMP's free GoToWebinar/GoToMeeting conference service.

Step 4: Create a Bank Account – Prior to submitting its *APMP Chapter Petition* packet, each chapter must set up its own local chapter bank account. This account is necessary because if your petition is approved by the APMP Board of Directors, your chapter will receive \$500 in *seed* money, which must be deposited into your new chapter account. Your quarterly chapter rebates will also be deposited in your chapter bank account.

Step 5: Reports and Deliverables – Each chapter must complete Quarterly Chapter Rebate forms to qualify for a quarterly rebate from APMP International (learn more about [Quarterly Chapter Rebates](#)). Information to be included on the Quarterly Chapter Rebate form includes a recap of meetings held, number of attendees at meetings, and the quarterly ending balance in your chapter’s bank account.

Step 6: Map Out Your Chapter’s Activities – Each APMP chapter is encouraged to engage in activities that promote the objectives of the chapter and APMP. Examples of these activities are a chapter newsletter, workshops and symposia, educational programs, and a website for exchanging ideas and information.

HOW TO FILL OUT YOUR ELECTRONIC APMP CHAPTER PETITION PACKET

Once you have completed the steps above, you are ready to move to the more formal part of the process, which is to fill out and return a formal *APMP Chapter Petition* packet. Follow these steps to fill out and submit the form.

1. **Step 1: Request the Electronic APMP Chapter Petition Packet** – Simply reach out to an [APMP Board Member](#) or an [APMP staff member](#) and request the packet. We will mail a packet to you within 24 hours of your request.

Step 2: Fill Out the Packet – Take your time in filling out the packet. It will include a number of elements that are key to starting your chapter, such as:

- **Your Official APMP Chapter Name** – [Click here for a list of approved Chapter names](#). Please note that most of the names have a regional description.
- **Chapter Officers** – We understand that chapter leaders will change throughout the years. This document only ensures they are identified up front and are willing to serve. Remember that, at a minimum, you will need a Chapter Chair and a Secretary/Treasurer to proceed. These officers should be able to commit to serving for a minimum of 1 full calendar year.
- **Mailing Address** – The chapter must include an address for receipt of all APMP correspondence. This may be a chapter officer’s residence or PO box.
- **Chapter Members** – The petition must name a minimum of 15 but ideally, 25 APMP professionals who would like to become members.
- **Chapter Operating Plan** – The chapter’s initial year’s operating plan will be

attached to the petition. This plan should include chapter meeting dates, locations, and agendas; selected workshops or symposia; operating budgets; and reporting requirements.

- **Chapter Logo** – Your chapter logo is your visual identity. Take some time to create a logo that represents the region or interest group that is the foundation of your chapter. This logo will be used in your chapter marketing collateral, can be used on your chapter cheques, and will be posted on the APMP International website.

You can see and use a successful petition by [downloading the APMP MENA Chapter Petition by clicking here](#).

APMP CHAPTER GRANT PROGRAM

APMP recognises that supporting its chapters can help with the growth of APMP overall. Sometimes, additional funds are needed to get a chapter chartered, in addition to legally recognised chapter seed money. Grant funds are an option for receiving additional preliminary funding through APMP.

Examples of grant programs for newly chartered chapters include:

- Funds needed to establish the chapter with a foreign government (usually for international chapters)
- An initial chapter symposium to raise awareness about the new chapter and encourage participation

To apply for an [APMP Chapter Grant, please download an application here](#).

To receive funding, an APMP chapter or prospective chapter making the request must be in good standing, which includes meeting the minimum membership requirements and being current with quarterly reports.

Please note that APMP is limited in the number of projects that it can support. Grants will be awarded depending upon:

- The total APMP International budget for the year

- The number of qualified grant applications received
- Whether a grant meets APMP's mission

APMP reserves the right to award a grant lesser than the amount requested. The APMP grant application will be reviewed by APMP's Executive Director and will be voted on by the sitting APMP Board of Directors.

APMP START-UP FUNDS AND QUARTERLY CHAPTER REBATES

Each APMP chapter receives a quarterly rebate from APMP International for members that have affiliated with your chapter. The original purpose of these quarterly rebates was to accomplish the following:

- Reinvest chapter funds back in members and grow membership locally
- Build a list of local offerings (member benefits) that will help chapters retain local members
- Connect local members with one another to build a stronger APMP experience
- Give APMP members an opportunity to meet, learn, and connect regularly on the local level

As mentioned before, when your charter is approved, your chapter will receive a start-up fund check from APMP International. To receive this check, simply invoice APMP International on behalf of your chapter once the charter is approved, and a check will be sent to you.

In addition, each chapter is eligible for a quarterly chapter rebate, which is a calculation of the number of APMP members affiliated with your chapter, multiplied by \$7.50. For example, if your chapter has 100 members, you are eligible to receive a \$750 quarterly chapter rebate check.

Quarterly Chapter Rebate Forms are always due 2 weeks after the end of each quarter. APMP staff will remind you of due dates and help you fill out the form, if needed. If your Quarterly Chapter Rebate Form is more than 30 days late, it is subject to forfeiture.

Please follow these steps to fill out your Quarterly Chapter Form:

Step 1: Sign in as a member to www.apmp.org – You must be signed in as a member or you can't go further.

Step 2: Proceed to – <http://www.apmp.org/?page=ChapterRebate>

Step 3: Fill out the form – Be sure to include your starting and ending bank (savings) account information.

Step 4: Hit Submit.

Please note that APMP members pay dues only to the APMP International Headquarters. Chapters are not allowed to collect dues from APMP members. Doing so will result in a revocation of your APMP chapter charter.



Recommended uses of your Quarterly Chapter Rebate funds include:

- **Local meeting expenses.** This includes correspondence (postage), facilities, refreshments, and other expenses directly related to publicizing and conducting meetings.
- **Membership Development Activities.** These activities are difficult to anticipate. If you have questions, contact a member of the Chapter Liaison Committee or an APMP Board Member.
- **Chapter Marketing Activities.** Marketing can mean many things. If you have questions, contact an APMP Chapter Liaison Committee member or an APMP Board Member.

Items you should never use your Quarterly Chapter Rebates funds for include:

- Any form of payment to chapter officers or chapter members, except reimbursements for approved expenditures—which must be supported by receipts. It is a serious conflict of interest to sit on a Board and charge for your products, services, or time.
- Meals for individuals or small groups.
- Travel except as authorized by the International APMP Board.
- Any form of entertainment.
- Any form of excess.

- Any expenditure that appears to benefit an individual or individuals, rather than APMP.

If you have a question, please contact APMP's Executive Director or APMP staff for further guidance regarding use of your Quarterly Chapter Rebate funds.

CHANGING A CHAPTER CHARTER OR CHAPTER BYLAWS

A chapter charter should never be changed, because it established the conditions for which the chapter was established and represents a specific event in time. However, it may occasionally be necessary to modify and update the bylaws of the chapter.

There should be a clause in your chapter charter that defines the procedure for amending bylaws. If there is not, a chapter may add the process and the conditions to change the bylaws as an amendment to the bylaws. Bylaw changes should be considered carefully and must be voted on and approved by your chapter Board of Directors.

A sample of the [APMP Ireland Chapter Bylaws can be downloaded here](#).

KEEP YOUR CHAPTER RUNNING

CHAPTER OFFICERS

In the initial chapter charter, the mandatory officers are a Chapter Chair and a Secretary/Treasurer. As your chapter grows, you should include other positions to help grow your APMP chapter. The following is a list of chapter officer positions and their responsibilities:

Chapter President

- Develop and maintain a chapter-level Strategic Plan
- Develop and implement new programs to maintain chapter visibility in the community
- Administer chapter activities in compliance with internationally approved policies and procedures (posted on the APMP website)
- Serve as principal point of contact with the APMP Board of Directors
- Attend regional/national/international meetings (as appropriate) and represent your chapter at the APMP's Bid & Proposal Con

- Support APMP marketing efforts
- Assist all chapter officers in carrying out chapter responsibilities and events

Chapter Secretary/Treasurer

- Prepare and maintain minutes of chapter meetings
- Maintain documentation that certified members can use to verify their accumulation of Continuing Education Units (CEUs)
- Prepare quarterly documentation to meet rebate requirements
- Prepare annual documentation to support year-end closeout requirements
- Establish chapter financial objectives and develop annual operating budget
- Control chapter expenditures through management of chapter bank account
- Collect and deposit all monies collected at chapter events
- Identify secondary funding sources to support chapter goals
- Support coordination of advertising activities for chapter promotions and events
- Coordinate activities with APMP International Marketing, Communications, and Membership activities
- Comply with APMP International policies and procedures
- Work with a local accountant to file your annual APMP chapter tax return

Chapter Marketing/Promotion/Communications

- Develop and execute a chapter marketing plan designed to help increase membership in APMP
- Develop and execute a plan to promote chapter public relations through news releases, articles, and event listings
- Co-develop and assist in publication of quarterly chapter newsletter
- Coordinate promotion and sale of all chapter materials, such as mugs, pens, etc., at chapter events

Chapter Program/Events Coordinator

- Recommend and manage calendar of events on a bimonthly or quarterly basis on www.apmp.org
- Organise and coordinate events with the help of chapter volunteers and APMP staff
- Manage quality control of all chapter events
- Solicit corporate sponsors to donate resources to support chapter events
- Design, develop, and produce promotional material for chapter events
- Supply all materials necessary for chapter events, such as name badges, audio-visual equipment, and audio-visual support for teleconferencing
- Promote maximum chapter participation at the APMP Bid & Proposal Con

Chapter Membership Services

- Collect and manage local membership information through an up-to-date member database
- Maintain a chapter mailbox and collect mail on a regular basis
- Maintain a Corporate Sponsor/Affiliate database and privileges, and prepare annual renewals
- Prepare a list of all attendees for any chapter event and forward to Programs/Events
- Act as coordinator prior to event
- Respond to all chapter inquiries for membership information
- Coordinate activities with the APMP Director of Marketing and Communications

Chapter Webmaster

Research other APMP chapter website(s) at www.apmp.org and develop and maintain your APMP Chapter's website functionality. This includes:

- Chapter contact information
- Calendar of chapter events
- List of any chapter corporate sponsors

In addition to the above duties, you should coordinate with APMP International to

have your chapter events promoted at www.apmp.org and we recommend that you liaise with other Chapters officers and members to keep your own website active

CHAPTER EVENTS AND ENGAGEMENT OPPORTUNITIES

The primary reason APMP members join local chapters is to take advantage of local events. They attend these events to learn, network, and share best practices.

At a minimum, your chapter should hold four annual events (one per quarter). Chapters must hold at least one event each quarter to be in compliance with their chapter charter. As your chapter grows and more members become involved, you may want to consider additional meetings for networking purposes.

Examples of events include:



- An industry education webinar or conference call (particularly good for virtual chapters)
- A half-day or 1-day training program on a topic related to people in the proposal and business development lifecycle
- A 1- or 2-day symposium featuring topics of interest to people in the proposal and business development lifecycle

Please note that APMP International does not pay speakers or pay for their travel costs for the simple reason that most speakers have a product or service that they are selling to our audience. In short, we do not recommend that you allocate your chapter funds to vendor speaker or travel.

Meeting dates and locations should be scheduled and promoted at least 6 weeks (and ideally 12 weeks) in advance. Your chapter should set standard intervals (e.g., the second Thursday of the month) to schedule meetings, so that members of your chapter can put meetings on their schedules as far in advance as possible.

Standard In-Person Meetings

In-person chapter meetings are typically held at a member's facility, such as an office, or hotel meeting room. The meeting's presenter should be provided with the

appropriate technology (e.g., a projector, laptop hookup, projection screen). If refreshments are provided, they may be delivered by a local vendor or brought to the meeting by a chapter member. It is best to have food Organised before attendees arrive.

It is customary to charge a nominal fee to cover the expenses of holding the meeting, but your chapter may elect to make the event free of charge. Ask for RSVPs in your promotional email to gauge how many people to buy food for.

The meeting should be well-promoted, and a meeting agenda should be provided in promotional emails. If the chapter has invested in marketing materials such as mugs, pens, apparel, or other things, make some of these items available as giveaways at the meeting. Consider giving away APMP certification certificates or other prizes that will aid in an APMP member's professional development.

The presenter should be made aware that there will be no onsite publishing capabilities. If he or she wants to offer handouts, the presenter should be prepared to offer hard copies or take email addresses and distribute material electronically.

Once the meeting is over, make sure the room is left in the condition you found it. A recommended final touch is for the Chapter Chair to write or email the appropriate member contact, thanking them and their company for the use of the facility.

Virtual Meetings

Some chapters may elect to hold their meetings virtually (by conference call, webinar service, or Skype).

APMP chapters are growing their geographical boundaries as they grow their membership. It is unrealistic for some members to drive several hours to a 90-minute meeting. In other areas, getting across town can take more than 2 hours. For these reasons, APMP supports virtual meetings of all kinds.

APMP offers a free GoToMeeting and GoToWebinar service just for chapters. Learn how to use the APMP [GoToWebinar service here](#).

Roundtable Events

Roundtable events are meetings held in a formal setting, typically in a hotel conference area, and include dinner served to people sitting at a “round table.” Due to the significant costs involved in these types of events, roundtables are recommended only for more established chapters.

Good planning and good attendance can have a dramatic, positive impact on chapter finances. On the other hand, a poorly attended event can significantly hurt a chapter financially. Here are some guidelines:

- Hold four to six roundtables per year (in the beginning, alternate these with standard meetings)
- Present topics that are of high interest
- Seek recognised speakers
- Promote heavily
- Follow a pricing structure (for example, these were prices for an event held in a brand-name hotel: \$25 members in advance/\$45 non-members in advance/\$55 at door)
- Set a timeline (e.g., 6:00 p.m. Registration, 6:30 p.m. Dinner, 7:15 p.m. Program)
- Be sure your chapter can cover the cost of the event

Executive Dinner Briefings

Executive dinner briefings are a great way to get continued support from local corporate sponsors. They are a chance for executives to network and share best practices at the highest level. These events should be invitation only and should include key leaders from companies affiliated with your chapter. Here are a few more guidelines for successful executive dinner briefings:

- Conduct no more than two per year
- Make sure you have the company’s decision maker
- Aim for a total of four executives
- Do not invite executives from competing companies

- Make sure your chapter officers attend
- Have a minimal, pre-planned agenda to discuss

A Chapter Newsletter

A chapter newsletter can keep all your members up to date and offer valuable tips, trends, and techniques. When distributed as an email attachment, newsletter costs are kept to a bare minimum. Here are a few recommendations for publishing chapter newsletters:

- Produce one issue per quarter
- Distribute newsletter to all affiliated chapter members (this is an incentive for non-affiliated members to affiliate)
- Publish, at a minimum, two feature articles and letters from the chapter President and/or newsletter editor
- Remember to include advertisements and industry announcements
- Encourage advertisements to support your local chapter by selling them for half page, quarter page, eighth page. (Some chapters give discounts in advertising to the chapter sponsors. If you don't give advertising discounts, give sponsors recognition within the newsletter.)

The Chapter Website

This is your visual window to APMP members that affiliate with your chapter and to the world. It should be attractive, look professional, and above all, be kept up to date. You have great flexibility as to the content you may include. The APMP International website will link to your chapter site. Here are suggestions of what to include on your website:

- A calendar of events
- A table listing the chapter officers and their contact info (email addresses)
- Articles summarizing past meetings or promoting upcoming meetings
- Articles promoting the local chapter and its members and activities
- A “member spotlight” article
- Information and links to APMP International programs, such as the APMP

certification area

- Links to your corporate sponsors

Tips for Sponsorship

Strong relationships with key corporations offer chapters many advantages—and reciprocal advantages flow back to the company for their sponsorship. Look for established corporations within your chapter territory that have significant proposal shops. Sell them on the advantages of being a sponsor to your chapter. Charge a sponsorship fee (suggested €500/year) that is renewable annually. A potential benefits package to encourage sponsorship is:

- First priority for representation at two Executive Dinner Briefings per year
- A 20% discount for all company representatives that attend a Roundtable
- Advertisement as a corporate affiliate in all chapter publications and at all chapter events

CONNECT WITH TIPS AND RESOURCES

THE BOARD OF DIRECTORS

The APMP International Board of Directors is the governing body that oversees the long-term and strategic planning for the association (click for the full list of [APMP's Board of Directors](#)). As a member of APMP, you are welcome to contact any APMP Board member or staff person with any questions. To help you understand the structure of the APMP board, member roles and responsibilities are listed below.

Executive Director

This is APMP's full-time paid staff member who is responsible to the Board for the leadership and overall running of the Association. The Executive Director will support the approval of your initial Chapter petition and will authorize monies and sign quarterly rebate checks. The Executive Director can answer all questions about the international organisation in general and is a non-voting member of the APMP Board and Executive Committee.

Vice President, Business Development & Operations

This is APMP's full-time paid staff member who is in charge of the day-to-day operations of the Association and the US-based Conferences and Events, including Bid & Proposal Con. The VP negotiates all APMP contracts and can offer guidance on negotiations for individual conference events, such as symposia and the issues surrounding APMP operations and ongoing practices.

Director of Membership

This is a full-time paid staff position in the association with the role of promoting APMP International as the leading source for proposal, bid, business development, capture and graphics professionals, certification/accreditation, education, and events. This person can assist you in posting announcements on www.apmp.org and help you with communications, such as group emails, to support your events.

Business Development Director – Europe

This is a full time paid staff position within APMP and is responsible for managing existing and potential Corporate Memberships in Europe. Duties also include supporting the European Chapters and acting as the local representative of APMP in Europe.

Membership Coordinator

This is a full-time paid staff position within APMP and is critical to the support of your chapters. This individual maintains the database of all APMP members. The Membership Coordinator sends out new member packages and reminders when membership is about to lapse. This person assists chapter leadership in verifying the correct affiliation of members in each chapter. Questions should be directed to this individual about membership and about support of your chapter events.

APMP Certification Program Director (Vacant)

This is a part-time paid staff position. The Certification Program Director is responsible for support of the APMP certification program. This is offered to all APMP members and should be promoted by your chapter. Coordination with the Program Director can bring classes or workshops to your chapter, allowing multiple members to prepare for the Foundation level exam in a group environment. Any questions about the APMP Certification Program should be directed to this individual. [Click here to learn more about APMP's Certification Program.](#)

Chair

This is a volunteer position on APMP's Board of Directors. The Chair directs the Board of Directors for the 1-year term that they fulfil. This individual leads all Board meetings and supports the annual conference and the fall symposia, when possible. The Chair will answer inquiries concerning the health of the organisation and issues that arise from members.

The Chair is part of the Executive Committee. If possible, in conjunction with the Executive Director, the Chair will represent the organisation on occasions that call for executive representation. The Chair cannot bind the organisation as the Executive Director can, but necessarily has experience and current knowledge of the

organisation. The Chair's participation in industry events benefits the branding and image of APMP.

Past CHAIR

This is a volunteer position on APMP's Board of Directors. The past Chair remains on the Board for 1 additional year after serving as Chair. This helps ensure a smooth transition for the incoming Chair. The past Chair has full voting privileges on all Board votes.

Typically, each Chair has an area of focus or passion. While serving as past Chair, they can continue to focus on the issue and bring it to resolution, while still leading parts of APMP. Often, past Chair are a great resource for executive engagements, as they have outstanding knowledge of the organisation and can answer questions on a wide variety of APMP-related topics. The past Chair is part of the Executive Committee.

Vice Chair

This is a volunteer position on APMP's Board of Directors. This individual speaks to the operations of the organisation. After a 1-year term in this position, the COO becomes the Chair.

This individual has a strong understanding of how APMP functions. Questions directed to this individual are generally related to the functionality of APMP and its capability in specific instances. The Vice Chair is part of the Executive Committee.

The Chapter Liaison Committee

These are volunteer positions on APMP's Board of Directors. Along with APMP's Membership and Chapter Coordinator, the members of the Chapter Liaison Committee are the primary contacts for all Chapter officers. Chapter Liaison Committee members answer questions or work through challenges that Chapters face.

Committee members have access to all tools that APMP offers and should be able to get you anything you need to support your success. Committee members can be very

helpful in guiding you through the critical first few months after your Chapter has been chartered.

Conference Co-Chair

This is a volunteer position. This individual works with the Executive Director to plan, execute, and deliver lessons learned for Bid & Proposal Con. The Executive Director will secure the hotel for the event; the Conference Co-Chair works with staff to plan event activities.

A Conference Co-Chair is invited to the position and is usually a senior proposal professional. This individual helps create a timeline and a countdown to the conference. Working with staff, they help secure keynote speakers, send out a call for papers, and make selections based on submissions received. They create a conference schedule and secure vendors who are willing to support the conference financially. At the conference, they are the emcee and are the chef point person.

After the conference, the Conference Co-Chair executes a lessons learned session and distributes all feedback to the appropriate speakers. As a final task, the Co-Chair hands off the conference responsibility to the conference team for the next Bid & Proposal Con.

APMP RESOURCES FOR YOU TO USE

The APMP Website

APMP's website is www.apmp.org. It is divided into two parts: general information that all visitors can see, and secure information accessible only by members in good standing.

General Information

When you go to APMP's website, the following selections are available from the home page:

- My Profile
- Latest News
- APMP Events Calendar
- Home
- Membership
- Chapters
- Communities
- Certification
- Conference
- Publications
- Resources
- Webinars
- APMP Online Store

The website is regularly updated and is an excellent source of international and local chapter information. Once you have built a chapter-specific website, a link will be established from the international site to your chapter-specific site, making it easy for a visitor looking for this information to learn about your chapter. In addition, your chapter events will be posted to the international site so all can see any upcoming events your chapter is hosting.

Secure "Members Only" Information

Members in good standing can log into a secure section of the APMP website. Here members can update personal information and pay dues. Additional benefits and information are located here and available only to members. These include:

- All past editions of the *Perspective* and *Journal of the Association of Proposal Management*
- Access to the Body of Knowledge

These are powerful tools that offer knowledge and information specific to the proposal world. You can research these articles by key words and tailor how information is received. If you are struggling to find help in specific proposal areas, this Body of Knowledge is invaluable.

Quarterly Chapter Leaders Teleconferences

Each quarter, APMP staff schedule a 1-hour teleconference call with Chapter Leaders. These calls are meant for exchanging ideas and troubleshooting Chapter Leaders challenges. This is another opportunity for APMP Chapter Leaders to ask questions in a targeted format.

ADVICE ON KEEPING YOUR CHAPTER ACTIVE (FROM SUCCESSFUL APMP CHAPTERS)

Once your chapter is approved, the following guidelines and suggestions will help you keep the chapter running.

Getting Started

- Establish an early relationship with APMP International staff and sitting APMP Board of Directors for such things as seed money, organisation ideas, contacts, the latest list of APMP members in your area, and APMP membership/information brochures. Building these relationships will make establishing your chapter much easier.
- Publicise APMP locally and recruit new members. This will help you establish a starting base of members to begin chapter planning and development.
- Assign functions for pre-chapter development jobs, (ie APMP Liaison/Chapter Chair, Membership Chair, Secretary/Treasurer, and Program Chair).
- Set a realistic membership goal as a prerequisite for submitting a charter application. Although 15 is a minimum for chartering, this number may not be enough to sustain a young chapter.
- Conduct a kickoff business/dinner meeting with a program that has wide audience appeal. This will help you judge area interest and support your recruiting effort. Try to arrange the presence of an APMP International officer or board member for credibility and support.

Establish membership recruitment as your primary chapter goal. Chapters that focus on membership recruitment early generally continue to grow long after they are established. Conversely, chapters that don't recruit stay flat or decline in numbers.

Clearly outline and communicate chapter officer responsibilities. Ensure new officers are current APMP members, that they are prepared to perform all assigned duties in a timely manner, and that they will commit to remain in their positions for at least 1 calendar year.

Determine your chapter's priorities. Whether the goal of your chapter is to share best practices, provide networking opportunities, or offer professional development, you will need a healthy number of members to make your efforts worthwhile. Ensure that all members are on board with the chosen priorities for your APMP chapter.

Organising Meetings and Events

- After receiving charter approval, maintain a regular meeting schedule that accommodates the commitment and availability of officers and core group members, as well as the interests of other members and potential members. At first, consider holding meetings quarterly, alternating between a formal business/dinner meeting at a local hotel and an informal business/program meeting at the company facility of an APMP member. As interest and membership increases, meetings can then be held more frequently.
- If meetings are held quarterly, consider holding a Chapter Officers' meeting in a non-meeting month to discuss detailed chapter planning and activities.
- Although it seems preferable to have each formal business/dinner meeting at the same hotel, don't commit to one site too soon. Consider trying several hotels to assess member and participant reaction before choosing a permanent meeting site. Be aware that many hotels are willing to negotiate price and service terms; don't be afraid to ask for discounts and better terms, based on your chapter's needs.
- Holding informal meetings at a company facility will help you involve different members in chapter activities and will allow meeting participants to see the proposal facilities and resources of other companies.

- Providing food at the informal meetings can be a challenge. To minimize your work and the need for kitchen-type resources, order pizza or bring in local takeout and have it delivered to the facility.
- Publicise the chapter meetings with announcements on the APMP International website, your local website, publications and several timed mass emails.
- At the formal and informal meetings, have drawings for APMP giveaways such as mugs, shirts, and conference giveaways. Select the winners and hand out the goodies near the end of the meeting. Give an APMP mug or some APMP memento to each guest speaker.
 - Often, vendors are willing to support APMP efforts by providing handouts. Take advantage of these. This is a great way to collect business cards to verify the status of the individual who attended. If they are not a member, reach out to them. If they already are a member, verify their information with your chapter database records.
 - Negotiate quantity discounts on books and papers that you make available to local chapter-affiliated APMP members.

APMP members who affiliate with your chapter will best respond to topics that add value to their role at work or to their personal professional development. Below is a sample list of some of the more popular topics to consider for meetings or events:

- What to Do Before Draft/RFP Release
- The Art of Good Capture Planning
- IDIQ Proposals – Why the Stress?
- What Evaluators Really Look For
- The Ideal Proposal Team Size
- Good Graphics
- Submitting International Proposals
- MS Word Tips, Trends, and Techniques
- Capture Management vs. Proposal Management
- When Do I Bring In a Consultant?

- Price to Win Strategies
- Different Contracts and Their Risks
- How and When to Influence the Customer
- Beating the Incumbent
- Writing a Customer-Focused Document
- BD is not BS
- Creating an Accurate Budget for any RFP Response
- Holding Effective Color Team Reviews
- Life Beyond Proposal Management
- Actually Using Lessons Learned
- Creating Effective Themes and Strategies

Communicating with Members

Negotiate an early commitment for a dedicated newsletter writer/editor. Start with a simple, small newsletter to minimize associated writing, layout, and publication tasks. Establish a realistic publication schedule that the writer/editor thinks can be met in a timely and consistent manner. The sophistication, size, and frequency of the newsletter can increase as the chapter grows. Ensure that chapter news is forwarded to the APMP Director of Marketing and Communications.

- With limited material and personnel resources, try to develop chapter programs and services that clearly provide benefits to members. For example, an employment opportunity program for matching employers and employees seems to be a particularly popular service.
- Update your mailing list database based on new names and names on the list offered monthly by the International Marketing, Communications, and Membership Services Director.
- Build your database to include personal information that might be needed in the future, for instance, home/business and fax phone numbers, home/business addresses, and/or mobile numbers.
- Manage the work of sustaining a chapter the same way you manage delivering a proposal. Use similar tasks and your proposal management knowledge to

charter and sustain an active chapter.

SUMMARY

APMP chapters will continue to grow and evolve, and APMP International intends to help build new chapters wherever there is demand for them. We hope this guide provides enough information and resources to get you started—but we realize there will always be unanswered questions.

If you need help, any APMP staff member, Chapter Liaison committee member, or member of the APMP Board of Directors will be glad to answer any questions.

HELPFUL LINKS

Below are links to some helpful chapter tools. You can find more by going to the Chapter Resources Group Page at www.apmp.org.

[Sample Chapter Petition \(Ireland Chapter\)](#)

[APMP W-9 Form](#)

[APMP Corporate Sponsorship Brochure](#)

[APMP Corporate Membership Brochure](#)

[APMP Social Media Policy](#)

[APMP Chapter Reinstatement Guidelines](#)

[APMP Conflict of Interest Policy](#)

[APMP Records and Retention Policy](#)

[APMP Whistleblower Policy](#)

ADDENDUM: APMP CHAPTER OFFICER POSITION DESCRIPTIONS

Every chapter needs a core group of people in specific officer roles. The size of that group depends, in part, on the size of the chapter, but other factors may affect this as well. This document suggests chapter officer positions that are typically essential to any chapter. It also describes other potential positions drawn from the experiences of chapters whose needs go beyond the essentials as a result of size, location, or other factors.

Chapters are free to define their own officer positions and give them different titles; however, most chapters implement the following positions¹:

- ***President/Chair***
- ***Vice President/Vice Chair***
- ***Treasurer***
- ***Secretary***
- ***Membership/Recruitment Coordinator***
- ***Marketing/Promotion/Publicity***

These positions generally suffice for smaller chapters and prevent people from getting buried by too much responsibility. Other chapters may have a need for positions such as:

- ***Programs Coordinator***
- ***Symposia and Special Events Chair***
- ***Symposia and Special Events Chair***
- Lead the chapter Board of Directors in all activities related to an annual symposium (full-day or multi-day), including discussions of conference theme, venue, speaker identification/selection, abstracts/presentations review and symposium-day activities
- Ensure a positive, professional and beneficial annual symposium event that advances the knowledge and networking opportunities of APMP chapter members
- Work with the Sponsorship Chair, if applicable, to ensure the sponsor-friendliness of the symposium
- Develop timelines, role descriptions for Board members, contact sheets, and other materials needed to plan and execute symposium preparation
- Work with the symposium venue to arrange facilities, event dates, infrastructure, room accommodations and other symposium-site matters
- Communicate with other APMP chapters to share ideas on symposium activities
- Event Venue Coordinator
- ***Sponsorship / Corporate Partner Chair***
- ***Website / Social Media / Technology Chair***

¹ Position titles are hyperlinked to their respective definitions (given later in this document).

- *Chapter Certification / Accreditation and Training / Education Chair*
- *Regional Reps/Chairs / Directors-at-Large*

It is important to note that each chapter has different needs and, therefore, may choose to implement any position necessary to keep the chapter running smoothly. Chapters may elect to combine positions or split responsibilities among multiple officers, as needed.

It may also be appropriate to create a working party that supports a particularly active position, such as the Events position and with geographically diverse Chapters it may well be worth considering appointing a post to look after a geographical area.

BOARD POSITION DESCRIPTIONS

PRESIDENT/CHAIR

- Provide vision and direction for the local chapter
- Take general charge, supervision, and authority over the property, affairs, and business of the chapter and its officers
- Conduct regularly scheduled officer meetings. Initiate the meeting agendas; establish and communicate the meeting location and time; ensure all officers and committees routinely report on activities; track action items from each meeting
- Prepare chapter business announcements for each chapter meeting, including upcoming events and introduction of new members, and special recognition
- Ensure that all important events and association business are reported to chapter members
- Maintain co-signature check signing responsibility with Treasurer and serve in his/her absence to ensure bills are paid promptly
- Serve as a point of contact with other regional chapters, regional directors, and the national association for chapter communication and co-sponsored events
- The responsibilities of this position are sometimes shared among Co-Chairs

VICE PRESIDENT/VICE CHAIR

- Assists the President/Chair in executing his/her responsibilities
- Takes over President's/Chair's duties when that person is unable to perform them for any reason
- In smaller chapters, this person may be tasked with recruiting speakers, assisting with event planning, etc.

TREASURER

- Maintain all financial records for chapter
- Prepare and deliver quarterly rebate reports to APMP, including a year-end financial statement in the 4th quarter
- Review bills for accuracy and pay bills in a timely manner
- Reimburse officers/chapter members for chapter expenses such as supplies, printing, etc.
- Coordinate with Membership Chair(s) to ensure membership status of meeting attendee
- File chapter tax reports with the appropriate tax state and Federal agencies

SECRETARY

- Provide minutes of officer meetings to the chapter Chairs
- Provide chapter meeting minutes to Web/Publicity Chair for posting on the chapter web site
- Supply and collect sign-in sheet for chapter meetings (or get the information from virtual meeting software)

- Provide chapter officers and the international organisation with a semi-annual / annual report and list of meeting attendees for affiliation credits

MEMBERSHIP/RECRUITMENT COORDINATOR

- Encourage and promote membership in the chapter and APMP at various chapter activities
- Provide marketing and membership information to potential new members
- Provide an up-to-date membership mailing list to officers or fulfillment personnel on a recurring basis for mailings such as the e-newsletter, special invitations, etc., as well as for chapter web site library access
- Send (or cause to be sent) an individual welcoming message to each new member. Provide new member list to the President/Chair to ensure that new members are especially welcomed and identified at the first chapter meeting they attend
- Identify opportunities to invest in membership and coordinate activities with other officers to ensure retention of existing members and promotion of new membership

MARKETING/PROMOTION/PUBLICITY

- Prepares chapter newsletter
- Establishes and maintains a promotion/publicity program

PROGRAMS COORDINATOR

- Sometimes combined with Event Venue Coordinator
- Plan, create and coordinate programs for chapter meetings and special events, including identifying speakers, meeting locations, presentations, and workshops
- Collect biographical information for speaker introductions and description of presentation(s) for meeting announcements
- Ensure speakers are notified of time and location of event and send them directions if required
- Communicate upcoming events to the membership through e-mail announcements, newsletter and website
- Work with the President and Membership Chair(s) to encourage interaction with other associations and coordinate co-sponsored events

SYMPOSIA AND SPECIAL EVENTS CHAIR

- Lead the chapter Board of Directors in all activities related to an annual symposium (full-day or multi-day), including discussions of conference theme, venue, speaker identification/selection, abstracts/presentations review and symposium-day activities
- Ensure a positive, professional and beneficial annual symposium event that advances the knowledge and networking opportunities of APMP chapter members
- Work with the Sponsorship Chair, if applicable, to ensure the sponsor-friendliness of the symposium

- Develop timelines, role descriptions for Board members, contact sheets, and other materials needed to plan and execute symposium preparation
- Work with the symposium venue to arrange facilities, event dates, infrastructure, room accommodations and other symposium-site matters
- Communicate with other APMP chapters to share ideas on symposium activities

EVENT VENUE COORDINATOR

- Sometimes combined with Symposia and Special Events Chair
- Research, plan, and coordinate appropriate venues for chapter meetings and special events
- Communicate venue options and details with Board members to foster informative and cost-conscious decisions
- Manage, coordinate, and verify venue contracts and statements for accuracy and completeness
- Work with the Treasurer to ensure prompt payment and coordination with venue POC

SPONSORSHIP / CORPORATE PARTNER CHAIR

- Ensures positive, mutually beneficial relationships between chapter sponsors, the chapter, and the membership
- Conducts regular meetings or briefings with sponsors to exchange ideas; share news, trends, concerns and opportunities; and ensure that sponsors are taking full advantage of their sponsorship package benefits
- Conducts a “strategy meeting” three to six months in advance of the Chapter's annual symposium to begin planning activities for the event
- Seeks to elevate current sponsors to higher-level sponsorship opportunities
- Reviews sponsorship levels annually to ensure that sponsorship offerings match needs
- Targets a set number of companies (TBD) to approach for sponsorship; with the full Board of Directors, develop the strategy for bringing on new sponsors
- Communicates with other APMP chapters to share ideas on sponsorship programs

WEBSITE / SOCIAL MEDIA / TECHNOLOGY CHAIR

- Maintain chapter website, including annual symposium web page
- Build photo library of meetings & events for use on web site and in print/electronic materials
- Develop (in association with Membership Chair[s]) chapter marketing messages and materials
- Submit chapter news for inclusion in APMP/chapter communication vehicles (APMP.org, The Perspective, APMP.org forum, LinkedIn chapter/APMP Groups)
- Archive (online) previous chapter meeting minutes, presentations, newsletters and articles
- Manage membership access to online materials library

- Submit all web site maintenance invoices (annual domain name registration fee, monthly hosting fee, etc.) to Treasurer for payment

CHAPTER CERTIFICATION / ACCREDITATION AND TRAINING / EDUCATION CHAIR

- Establishes and promotes a plan for certification of chapter members
- Encourages members to pursue accreditation/certification to enhance their career potentials
- Arranges for training/testing of candidates
- Coordinates activities with APMP's Director of Certification

REGIONAL REPS/CHAIRS / DIRECTORS-AT-LARGE

- For large chapters, these positions ensure diverse perspectives are included in board-level decision-making
- Representatives attend regularly scheduled board meetings
- May be assigned special duties by Chapter President/Chair