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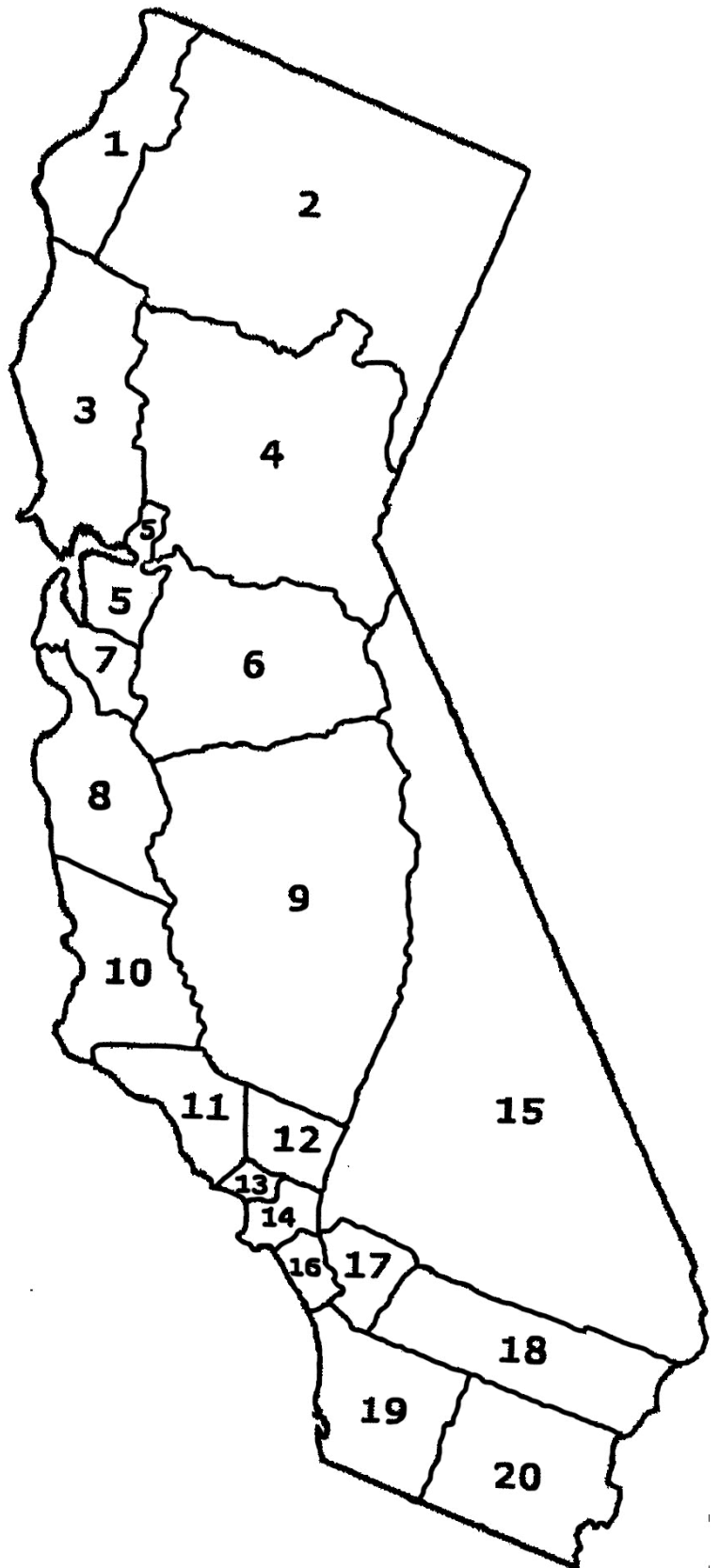
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- [06. Central Valley Chapter](#)
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- [15. Desert Mountain Chapter](#)
- [16. Orange County Chapter](#)
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- [19. San Diego County Chapter](#)
- [20. Imperial County Chapter](#)



1. INTRODUCTION

Thank you for serving as a Chapter Chair or Vice Chair and being a leader in the California Society of Municipal Finance Officers (CSMFO). Your job is an important one, with certain responsibilities including scheduling recurring meetings, selecting topics and speakers, and attending Chapter Chair Leadership coordination meetings and CSMFO Board Meetings.

CSMFO Chapters across the state provide a local and regular educational opportunity where members can connect with and exchange ideas with each other on topics meaningful to their agencies. While most meetings remain virtual, we envision that Chapters will settle into a mix of virtual and in person meetings, depending on the interest of members locally.

CSMFO is committed to your success and assigns the immediate Past President to hold leadership meetings every other month, to support your needs and provide guidance. In addition, CSMFO provides administrative and meeting logistical support and can provide, as necessary financial support.

If you need support during the year, the Past President and the Board of Directors are available to provide assistance. Please feel free to use the resources we have available.

1.A. YOUR RESPONSIBILITIES & THIS HANDBOOK

Each Chair is responsible to the Board of Directors for the leadership necessary to conduct an effective program in accord with the policies and procedures of CSMFO. Chapters play an important role in the CSMFO organization. The regular meetings of each Chapter provide our membership with opportunities for personal and professional development that can only be accomplished at the local level. They also create an environment that allows the membership to grow and learn from others.

Following are the minimum responsibilities of each Chapter Chair (or Vice Chair):

1. Schedule in advance recurring chapter meetings at least twice a year and send subsequent calendar year list to Executive Director by Nov 1st.
2. Attend Chapter Chair Leadership coordination meetings (Vice Chair may replace a Chair),
3. Write an annual report of activities, generally due to Executive Director by mid-January,
4. Identify your successor,
5. Help peers see the value of joining CSMFO,
6. Attend at least two CSMFO Board Meetings,
7. Attend the annual Strategic Planning session (generally in September or October), and
8. Support the annual conference by volunteering for duties, notifying your chapter members in advance to attend Chapter events (such as meetings or chapter breakfast).

This handbook has been prepared to assist in accomplishing these responsibilities. As you use the handbook in conducting your own Chapter leadership program, please make a note of any improvements that would make the handbook more useful. *The handbook should be considered a living document maintained and improved for transmittal to the next chapter leaders.* Please send any suggestions you may have for improvements to the handbook to the CSMFO office.

Thank you for volunteering to support CSMFO and for your leadership. With your support, we can all continue to strengthen our organization to meet our vision of being the preeminent resource for promoting excellence in government finance.

2. PLANNING YOUR MEETINGS

Meetings should be planned well enough in advance to permit sufficient time to arrange for a meeting location, well qualified speakers and proper publicity. Topics and speakers should be chosen carefully. The five major elements, which contribute to successful and well-attended meetings, are as follows:

- Topics and speakers that are interesting
- A pleasant environment
- A current mailing list/advance notification
- Schedule of all meeting dates & times
- Consistency in place and day of meeting
- Good food at a reasonable cost

2.A. MEETING SCHEDULES

The Bylaws provide that Chapter meeting schedules shall be determined by the Chapter membership. A regular schedule of meetings for the upcoming calendar year should be established by November 1st and sent to the CSMFO Executive Director before the year starts. Most Chapters hold four to six meetings a year but no less than two per year.

Please be sure that your Chapter meetings do not conflict with other CSMFO activities. ***Always review the [CSMFO Events Master Calendar](http://www.csmfo.org) at www.csmfo.org for up-to-date listings.***

2.B. SELECTING THE TOPIC AND SPEAKERS

Topics and speakers should be chosen carefully. Select speakers who have imagination, originality, and the ability to get an idea across. To assure well-balanced programs over the course of the year, assign topics to speakers rather than allowing them to select their own.

In panel presentations, if the main speaker is to present an unbiased, informative explanation of the topic, the panel members should be selected to balance each other's opinions--pro and con.

Topics for Consideration

- Current and Pending Legislative Action
- Banking
- Generally Accepted Accounting Practices
- Compliance w/Federal and State Regulations
- Ethics
- Long-range Planning
- Disaster Recovery Planning
- Pensions
- CSMFO Programs/benefits of membership
- Budgeting
- Economic Forecasts
- Financing Capital Projects
- Inter-Agency Relations
- Hiring Employees
- Management Information Systems
- Technology and Public Finance
- Retaining or supporting workforce
- Investments

Suggested Sources of Speakers

- Finance Officers
- Attorneys
- Certified Public Accountants
- County Assessors, Tax Collectors, etc.
- College/University Professors
- Elected Officials/Legislators--State and Local
- CSMFO Board and Committee Members
- Economists
- Interesting CEOs
- City Managers
- Bankers
- Bond Counsel
- Financial Consultants
- Electronic and Print Media
- Chambers of Commerce
- City Professional Staff
- Strategic Planners
- Federal Reserve Officials

For potential topics and speakers, please see Basecamp or the Chapter Community within the CSMFO Knowledge base . Knowledge base is accessible through your CSMFO online account at www.csmfo.org.

CAVEAT: There must be **NO SALES PITCH**. As Chair, your responsibility is to make sure the presentation is informational and generic in nature. **NO COMMERCIALS!**

All meeting details should be confirmed with the speaker in writing in advance of the meeting. Provide the speaker with an idea of the type of meeting and the attendance to be expected. Ask for biographical material prior to the meeting. An outline of the speaker's presentation and/or a copy of handout material for your review prior to the meeting are also helpful.

Some Chapters have a tradition of presenting speakers with gifts to acknowledge their efforts. While this practice is not mandatory, CSMFO would like to encourage this practice.

2.C. SPONSORSHIP GUIDELINES

CSMFO acknowledges that commercial vendors are key partners in the success of our organization. The annual conference would not be possible without commercial sponsorships, and individual chapters may wish to seek commercial sponsorships to defray costs of special meetings from time to time. As such, CSMFO wishes to clarify the procedures for obtaining commercial sponsors for chapter meetings.

- 1) Chapters may request multiple sponsorships for chapter meetings, but should limit the sponsorships received from any one sponsor to no more than 50% of the estimated costs for any individual meeting.
- 2) Providing gift cards or other items to be raffled to the attendees of a chapter meeting is not considered sponsorship for the purpose of these guidelines. Raffle prizes should be less than \$50, but will allow discretion by Chapter Chair as they can work with Commercial members and sponsors of events for special purposes with advance notice.
- 3) Chapter speakers should be selected based on the value they present to the governmental members. At no times should a sponsorship be used to "pay" for the right to present at a meeting. As such, to avoid the appearance of impropriety, commercial sponsorships shall not be obtained from any company providing a speaker at that same meeting.
- 4) A sponsor may provide a short introduction and description of services for meetings they sponsor. That is not considered speaking for the purposes of these guidelines.

3. MEETING PREPARATION

3.A. MEETING REGISTRATION

Chapter meeting registration is provided by CSMFO staff. Meetings will be posted as events in the CSMFO database and on the CSMFO website ([Events Master Calendar](#)), allowing for online registration. Shown below is a guideline on typical key due dates. These are suggested as a best practice but can be changed based on Chapter desire.

	Site Selection & Pricing	Scheduling your meeting	Food Menu & Pricing	Registration Deadline	Audio, Visual	Refund Deadline & Food Order	Finalize Presentation Materials
In Person	10 weeks	8 weeks	3 weeks	1 week	1 week	3-5 business days	2 days
Virtual	n/a	8 weeks	n/a	24 hours	24 hours		2 days

To schedule your chapter meeting, submit your event details here: <https://www.csmfo.org/csmfo-chapter-meeting-form/>. Once submitted, a registration link will be sent back to you within 72 hours.

It is best to do this at least six (6) weeks in advance of your meeting, to allow ample online pre-registration time. Your event will be posted to the CSMFO website within 1-2 days. You will be sent the link to the online registration upon posting, for use in promoting the meeting. You will also be given a link to allow you to check registration counts directly.

In general, registration lists are not available to commercial attendees. If a chapter event is being sponsored, the Chapter Chair may at their discretion share the listing with the commercial sponsor(s).

Chapter chairs and vice chairs may receive complimentary registration to their respective chapter's meetings, in recognition of their time and effort. Presenters will receive complimentary registration for the meetings at which they speak. Chapters may provide complimentary registrations to host venues or those otherwise providing support for the meeting (up to two (2) per meeting).

Online registration will generally close one week prior to the meeting; you may request a different date if desired. Once online registration is closed, you may pull a registration list, complete with whether not payment has been received, through the admin link previously provided. A CPE certificate template for your meeting will be forwarded to you by SMA staff upon request.

After the meeting, send to the CSMFO office any checks received onsite at the meeting, along with contact information (such as a business card) for any who signed up onsite. Please make sure to note which checks are for which attendees. *NOTE: The CSMFO office cannot accept cash.*

3.B. MARKETING YOUR MEETING

Consider reaching beyond those you are already on your Chapter mailing/distribution list, such as:

- College students (community or 4-year colleges)
- Other departmental staff across local government agencies
- Finance staff in special districts or JPAs (Joint Power Authorities)

For college students, CSMFO has prioritized outreach to students through the CSMFO Student Engagement Committee. As you are setting your calendar for the coming year, please coordinate with the Student Engagement committee about opportunities to help CSMFO and, from a local perspective, help with any local internship or recruitment efforts. This could include marketing a future meeting topic relevant to students or holding an in person meeting on campus.

3.C. ONSITE MEETING ARRANGEMENTS

At least two months prior to the meeting, you should arrange the meeting place. You will need to know the following from each location:

- ✓ The room capacity
- ✓ Whether a separate room will be provided for the meal
- ✓ The price of the meal, tax and gratuity
- ✓ Room charge (if any)
- ✓ Your requirements for morning and/or afternoon refreshments
- ✓ No-host bar requirements
- ✓ Facilities for golf, tennis, racquetball or other sports if such activity is to be provided in the afternoon
- ✓ Seating arrangements (including speaker's table)
- ✓ Arrangements for slides, laptops, overhead projector, DVD/VCRs and any other audio/visual needs required by your speakers
- ✓ Registration table at door
- ✓ Percent of meals provided by restaurant more than the number guaranteed (usually 5%)

When selecting a non-traditional meeting site, please use proper discretion. *The CSMFO Board prohibits the use of CSMFO letterhead or signage to advertise events at places that may give the perception of unethical conduct (e.g., racetracks, gambling establishments, etc.).*

The Board recognizes there are a few Chapters that have traditionally met once a year at such places. The Board does not want to disallow such meetings nor do they want to dictate exactly what is or is not appropriate. However, the Board feels strongly enough about the issue that CSMFO will not officially endorse such meetings by use of its letterhead. The Board, therefore, encourages each Chapter Chair to use their own best judgment in making decisions regarding meeting places. If you feel you need further clarification or direction, please call your designated Board Director.

After the meeting place has been selected, get a written confirmation from the facility of the date and time of the meeting, menus, cost, room capacity and, in general, all the items you have discussed with them by phone. They will usually require a deposit. The meal price will be an important factor. It should be neither too high nor too low.

Consideration should be given to rotating scheduled Chapter meetings to various host agencies within the chapter. The host agency would schedule the program and speaker as well as coordinate the meeting location. This practice would reduce the workload of the Chapter leadership.

For deposits and payments that need to be submitted to venues, please submit information and documentation here: <https://www.csmfo.org/csmfo-chapter-payment-requests/>. The CSMFO office will then handle the payment.

3.D. REGISTRATION FEES

To determine the registration fee, you should add up the total costs listed below and divide by your anticipated attendance. You may consider charging non-member or commercial attendees a slightly higher fee for attending your meetings.

Include the following:

Lunch	_____
Tax	_____
Tip	_____
Morning and/or afternoon refreshments	_____
Room charge	_____
Minimum bar guarantee (if applicable)	_____
Postage and copy cost	_____
Speaker gift	_____
Total	_____
Anticipated paying attendance (Speakers are not charged)	_____
Fee per participant	_____

Once your Chapter has a sufficient reserve, you may create a set price for your events. It is common for any one event to finish with a cash surplus or cash shortfall depending on the final attendance and the guarantee that you must provide.

When making your guarantee, bear in mind that attendance is normally 85-90% of the total reserved. Some who reserve may not attend, and some who do not reserve may attend. If you are collecting sufficient funds at your meetings, you may be building an excess of funds.

You are not encouraged to build a significant balance of funds for your Chapter beyond a general reserve, however you can use those to pay for a speaker for a future meeting or to have a reduced or free meeting to encourage greater attendance.

NOTE: No dues may be charged by Chapters for any chapter members. CSMFO membership dues are set by the Board.

3.E. CONTINUING PROFESSION EDUCATION (CPE) REQUIREMENTS

To qualify as continuing education, presentations must meet specific standards set by the California Board of Accountancy. Essentially, a 50-minute presentation is equal to 1 CPE credit.

The California Code of Regulations regulate CPE requirements and detail what qualifies as CPE. See Title 16, Division1, Article 12, Section 88- Programs Which Qualify). They can be viewed within the California Department of Industrial Relations website or the California Board of Accountancy regulations website here: <https://www.dca.ca.gov/cba/about-cba/regulations.shtml>.

Here are the steps for a Chapter to ensure their attendees are able to obtain CPE.

- (1) Chapter chairs indicate on their meeting information form to CSMFO staff if their meeting is eligible for CPE
- (2) An attendee must request during their registration they want CPE.
- (3) For virtual chapter meetings, attendees must actively participate in virtual polls. CSMFO staff use the polls to determine who qualifies for CPE and emails the CPE certificates to qualifying attendees.
- (4) For in person meetings, the chapter must send the sign-up sheet to CSMFO staff to identify who qualifies and requested CPE. Certificates would then be emailed out.
- (5) Certificates are generally sent out within 2 weeks of the meeting.

Those chapter meetings that are CPE eligible are marketed as such by CSMFO staff in the chapter event post and in marketing materials.

3.F. REFUNDS

After the meetings, some individuals request refunds because they were unable to attend. If you have a good registration sheet, you can probably verify this. Also, you may receive refund requests prior to the meeting from people who will be unable to attend. It is a good practice to state in the meeting notice that refunds will be given only to those individuals who advise you in advance. Generally, that is one week before the event for in-person or two to three days in advance that they will be unable to attend.

You have guaranteed attendance at the meeting, and you are depending on the members who made reservations when you submit your final attendance figures. You may have to pay the facility for your guarantee. Accordingly, you may have to refuse refunds to those people who have not given you adequate notice. However, if there are sufficient funds available, you may use your own discretion to provide a refund.

3.G EVENT REPORTING

At the back of this handbook are event sheets. As Chair, you should fill out a sheet for each meeting you hold to help create your annual report. Record the date, location, topic, speaker, attendance, cost and fees collected. A notice of the meeting should be attached. *At the end of your term, pass this book on to your successor.* Maintenance of the event sheets for those who come after you is one of the most important things you can do for CSMFO.

4. THE MEETING DAY

4.A. BEFORE THE MEETING

Arrive at the facility early to make sure all is in order. You will need to set up a registration table. You will need to take the following supplies with you:

- The nametags for those who pre-registered (if you're doing nametags).
- Blank nametags and felt pens for use on the nametags (if you're doing nametags, for those not pre-registered)
- Change fund
- A list of the pre-registered individuals and whether they have prepaid or not
- CSMFO membership brochures and volunteer flyers
- Receipts for those that may request one
- If your session qualifies, CPE certificates for attendees

For Virtual meetings, coordinate with CSMFO staff to have your presenters and CSMFO staff join 30-minutes before the start of the meeting. It is important to test connections, sound quality, and screen sharing. If you are doing a raffle using an online tool, test the website and leave it open for quick access during the meeting.

4.B. STARTING A MEETING

You will Chair the meeting. You may find yourself a “rover” or “gofer” while at the meeting, taking care of last-minute details. If possible, delegate this to someone else. Be sure to document who attended, and, for CPE eligibility, may need to have attendees sign in. For the presentations, prepare a few questions to ask to stimulate engagement between the presenters and audience.

For virtual meetings, ask attendees to turn on their camera but mute their microphones during a presentation. Use the chat feature to remind attendees of this. And designate someone to watch for anyone who has virtually raised their hand to ask a question and to monitor the chat for other questions.

4.C. THE AGENDA

A neatly formatted, well-spaced agenda will serve as an aid in keeping the meeting events orderly, and it will be useful from the standpoint of timing. Besides serving as a guide to the order of business or events, an agenda may include the Chair's notes, in appropriate order, with reference to comments about the speaker and introductions.

Introductions

An introduction should be short. It should be interesting, appropriate and adequate, but still short. A good speech introduction might include: Why this speaker--at this time--to this audience?

Adjournment

Close the meeting with an announcement of the next meeting; an expression of appreciation to all those who have been present; a hope that they have enjoyed themselves; thank the speakers, and, if elections are to be held at the next meeting, announce them.

4.D. AFTER THE MEETING

The facility operator will ask you to sign the bill at the time of the meeting (even though you may be able to pay it later by check). Verify the number of people attending, the unit price, the extensions and the additions on this ticket before you sign it. You may wish to count the number of people at the luncheon after they are seated.

You may set up payment for the venue by emailing in advance CSMFO staff, or you may handle it personally. If you handle it personally, please submit your reimbursement request to the CSMFO office after the meeting, complete with receipt and information to whom to make the check payable, within sixty (60) days of the event.

5. CHAPTER BUDGETING & ACCOUNTING

Chapters are responsible for developing and managing their budgeting and financial results within the course of their meetings. Chapters should set their event pricing at enough to build a 10% reserve balance of their annual costs or up to 50% of the cost of a single event.

Chapters can pay for costs upfront and request a reimbursement, or ask CSMFO to pay vendors directly. If a Chapter does not have sufficient balances to pay upfront for an event, they should contact in advance CSMFO staff.

The CSMFO Board sets aside a minimum of \$500 per chapter annually in the operational budget to assist with chapter expenses. Requests can be emailed and sent to the Executive Director and Past President. Requests more than \$500 for any one chapter in any given year will be forwarded to the CSMFO Executive Director or a member of the Executive Committee for review and possible approval. Chapters should utilize their existing chapter funds for most of their expenses, and request assistance from CSMFO only in the case of a fund balance shortfall.

The CSMFO office is responsible for handling all Chapter accounting. Registration income is received by the CSMFO office, and is coded to your Chapter income. Likewise, all Chapter expenses should be run through the CSMFO office. To request a check or credit card payment from CSMFO, please email CSMFO staff. Please allow a 3-week turnaround on all check requests.

Chapter financial reports will be included in each packet disseminated for CSMFO Board of Directors meetings. This will be a profit & loss report specific to each Chapter. The Statement of Net Assets will show your Chapter's fund balance. To determine your Chapter's fund balance at any given time, simply add the net income from your Chapter's profit & loss report to the fund balance as listed on the Statement of Net Assets.

6. CONNECTING WITH CHAIRS & MEMBERS

There is a group email just for [Chapter leaders](mailto:chapterchairs@csmfo.org) (chapterchairs@csmfo.org) and a group email for each of the individual Chapters. This is replicated in the CSMFO Knowledge base accessible through your [CSMFO online account](http://www.csmfo.org) (www.csmfo.org).

Chapter leaders are encouraged to use these groups to connect with other chapter leadership (such as speaking topic or meeting tips) and to keep chapter members up-to-date on the latest happenings.

Chapter leaders will be notified of Board meeting and Chapter conference calls using these distribution lists.

The individual Chapter lists/knowledge base may be used to post meeting notices and changes, send inquiries to local members and post updates on local issues. These listservs are for you and your Chapter to use as a valuable communication tool to keep each other informed on regional financial news, reviews and events. Use this listserv in any way you find helpful. You will want members to observe standard e-mail use guidelines as a courtesy to others and to encourage members to join and participate. To make the list most effective, you will want to publicize the group list at your Chapter meetings and in your mailing notices. The more members on the list, the greater the opportunity to share local news.

Now the important part - how to join! Just like the CSMFO general members group list, you may subscribe directly from within your [CSMFO online account](http://www.csmfo.org). As a Chapter Chair, you may also add individuals to the list manually. In addition, CSMFO will distribute a "New Member" listing for each chapter on a regular basis. Chapter Chairs are encouraged to reach out and invite the new member to the next meeting.

To send a message to your Chapter, address it to the "name of chapter@csmfo.org" (for example: central-coast@csmfo.org). The Chapter names are listed below:

central-coast	desert-mountain	north-coast	sacramento-valley
central-la	east-bay-sf	northeast-counties	san-diego-county
central-valley	imperial-county	northwest-counties	san-gabriel-valley
channel-counties	inland-empire	orange-county	south-bay
coachella-valley	monterey-bay	peninsula	south-san-joaquin

For questions about the use of the listservs/knowledge base, please contact CSMFO staff.

6.A. CSMFO NEWS

The [CSMFO News](#) is intended to be a grassroots publication for information, input, articles, news clips, job changes, Chapter highlights, etc. coming from members across the state. The News is only as successful as individual members make it. Therefore, we hope you will be proactive in soliciting articles from your Chapter or submitting articles on upcoming meetings or to share what you learned from a presenter across all CSMFO.

It is easy to find a topic, simply remember that ***if it interests you, it's going to interest other members***. Maybe you could write about a local ballot measure or State regulation that's getting a lot of attention in your Chapter, or a project you've taken on that's interesting. Please coordinate submissions through the Communications Committee Chair.

6.B. ONLINE CHAPTER INFORMATION

Each Chapter has a [CSMFO Chapter online site](#). The section contains a brief summary of the Chapter and its regular activity, a list of Chapter contacts, and a link to join a Chapter's mailing list.

There is also a Chapter Resource area within Basecamp where this handbook is located or the CSMFO Chapter Chair within the Knowledge base,. There are also meeting ideas and past presentation information posted by all Chapters. Please review the contents and contact staff with revisions and updates.

7. SPECIAL MEMBER AWARDS OR RECOGNITION

On occasion, you may want to verbally recognize certain Chapter members during your Chapter meetings for accomplishments they have made in their own agencies, awards they have received through CSMFO or other associations, or milestones they have reached in their career, such as job promotions or retirement. This recognition is initiated at the Chapter level so consider creating time at the beginning of each meeting for such announcements or to remind members to contact you in advance with notice of such an accomplishment.

Special certificates of appreciation are also available to recognize those who have demonstrated long-term commitment to municipal finance and membership in CSMFO (20 years is the suggested benchmark). Such awards are generally given at retirement. The certificates can be obtained by contacting CSMFO staff at least three weeks in advance of the meeting. *Any Chapter Chair wishing to award a certificate of appreciation must first receive approval by the Executive Director or President.*

8. RESPONSIBILITIES FOR CHAPTER LEADERS

Following are the minimum responsibilities of each Chapter Chair (or Vice Chair):

1. Schedule in advance recurring chapter meetings at least twice a year,
2. Attend each Chapter Chair Leadership coordination meeting (Vice Chair may replace a Chair),
3. Write an annual report of your activities, generally due to the Executive Director by mid-January,
4. Identify your successor,
5. Help peers see the value of joining CSMFO,
6. Attend at least two CSMFO Board Meetings,
7. Attend the annual Strategic Planning session (generally in September or October), and
8. Support the annual conference by volunteering for duties, notifying your chapter members in advance to attend Chapter events (such as meetings or chapter breakfast).

Chapter Chair Leadership Coordination

Per Board policy, at least one Chapter Chair or Vice Chair from each Chapter are required to participate in Chapter Chair leadership coordination meetings, led by the Past President (unless excused by providing 24-hour notice to the Past President). These meetings are an opportunity to share meeting strategies, discuss organizational issues and communicate with your fellow Chapter leaders. It is encouraged that Chapter Chairs share information with each other, particularly regarding meeting dates and topics, so as not to unduly compete with other chapters.

Summary Article for The Annual Report

At the conclusion of each calendar year, you are responsible to prepare a Chapter Annual Report to summarize the events in your Chapter. This summary is generally due in early January and will be included in CSMFO's Annual Report.

A brief synopsis, maybe one or two paragraphs, is all that is required. Begin by listing your Chapter Chair and Vice Chair(s) by name, title, and agency they work at. As a best practice, highlight each meeting include speakers, topics, sponsors, and where your meetings were held. If applicable, consider including the number of attendees, acknowledging any sponsors, or thank any agencies that hosted a meeting.

Your Successor

Each Chapter should have a Chair and one or two Vice Chair(s). Terms are one year, and concurrent with the CSMFO Board terms (term begins and ends with the Annual Conference). There are no term limits for Chapter Chairs, but it is expected when the Chair steps down the Vice Chair will take their place. The Chair/Vice Chair structure was implemented by the Board of Directors as a means of easing a successor into the role of Chair.

Chapters are encouraged to hold elections annually for the position of Chair. It is recommended that elections take place at the last meeting of the calendar year. Elections may be held in whichever manner each Chapter deems most feasible (i.e., electronic, written ballot, show of hands, etc.). If a Chapter does not conduct an election, the Chapter Liaison/Past President may appoint a Chair. Vice Chair are appointed by the Chair.

Certain Chapters have experienced difficulty in developing a potential replacement. Experience has shown that many are willing to serve, yet are reluctant to volunteer. One of the primary responsibilities of a Chapter Chair is to nurture a successor. To maintain a vibrant organization, it is important to identify up-and-coming talent. Don't underestimate the power of the ask.

When you do step down as Chair and a new Chair/Vice Chair are appointed, please email CSMFO staff so that updates can be made to all applicable CSMFO documents. Please do not step down without first identifying your successor.

Membership Development

Chapters have a responsibility to CSMFO to support their peers by understanding the value of joining CSMFO. Membership applications and materials are available within the [Join CSMFO website](#), and brochures and volunteer flyers are available by request from the CSMFO office.

Special benefits of CSMFO membership include:

- heavily discounted training for the annual conference,
- discounted year-round technical training,
- access to a member only knowledgebase and learning management system,
- personal professional development through mentorship,
- personal leadership development by volunteering in CSMFO leadership roles, and
- bring prestige to your agency through any of CSMFO award programs.

See the [Join CSMFO website](#) for additional membership values.

Participate in CSMFO Board Meetings

The CSMFO Board of Directors regularly meets each year. As a Chair, you are encouraged to attend any or all Board meetings and to participate in the discussion of issues facing our organization. The in-person meetings are held at a minimum in conjunction with the Annual Conference and at the Board retreat in September/October. Review the CSMFO Master Calendar, or contact the Past President or CSMFO assigned staff for more information on exact meeting times and locations.

9. CSMFO CHAPTER MEETING SUMMARY (example)

MEETING

DATE

LOCATION

TOPIC

SPEAKER

ATTENDANCE

COST

FEES COLLECTED

Note: Please attach a copy of your meeting notice to the back of this sheet, and pass on all sheets to your successor.

10.Revision History

September 28, 2022. CSMFO Executive Committee approved minor edit to remove the following item #2 from the Sponsorship Guideline section that suggested a limitation on event sponsorship

2. Chapters can only seek sponsorship from each commercial entity once per calendar year.

July 18, 2022. Comprehensive Update (Accepted by the Board on August 18, 2022)

February 2020. Comprehensive Update