



**Case Management Society of America**

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# Case Management Society of America's Chapter Development Guide

A tool for starting a new CMSA chapter in your area.

## CMSA National Office

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## **What is a CMSA Chapter?**

CMSA Chapters are individual affiliates of the [Case Management Society of America](#). All CMSA chapters are [incorporated in Washington D.C.](#) and are incorporated in their own states as foreign corporations.

CMSA National prepares and submits [Articles of Incorporation](#) for each developing chapter to the Department of Consumer & Regulatory Affairs in Washington, D.C.

CMSA chapters are under the National Office federal tax group exemption number 3347 and are 501(c)(6) nonprofit organizations under the IRS code. This status does not qualify for Sales Tax Exemption.

## **Where can new Chapters be formed?**

A new chapter may be established anywhere in the United States providing its boundaries do not reach within 60 miles or 60 minutes of an already established chapter.

## **What if our prospective chapter territory crosses that of an already established chapter?**

Occasionally traffic congestion, geographic barriers, etc., inhibit access to an established chapter. With written permission from the Board of that chapter, the National Office may authorize a second chapter whose territories overlap in some way.

## **Why would we want our group to affiliate with CMSA?**

**CMSA is a national not for profit professional membership organization** focusing solely on supporting case managers and advancing case management. Affiliation with CMSA can provide:

- ◆ General Liability insurance for the chapter
- ◆ Directors & Officers (D&O) Insurance
- ◆ Increased membership retention & stability
- ◆ Enhanced identity
- ◆ Combined resources and support
- ◆ Growth in the industry and association
- ◆ Membership promotion materials
- ◆ National membership campaigns
- ◆ National networking and partnership opportunities
- ◆ Consultative support from Chapter Services
- ◆ Keep pace with political and legislative climate.
- ◆ National support, reducing labor and resource costs
- ◆ Leadership programs at National conference

## What's the first step in developing a Chapter?

1. A Prospective Chapter is established when an interested individual contact the [CMSA National Office](#) expressing interest in forming a chapter.
2. During this stage, the local group assesses the degree of interest.
3. No formal commitment to affiliate with CMSA is issued at this point.
4. The local group schedules an initial meeting.
5. The local group may extend invitations to attend an initial meeting by mail, email, fax, or telephone.
6. Note that local interest may vary, depending on the case manager population in your area.
7. Local chapter territory is defined as 60 miles or a 60-minute drive from the center of the chapter zone.

## Items National can Send to Assist

- ◆ A list of CMSA members within the chapter territory
- ◆ Membership materials when requested
- ◆ Networking list of CMSA affiliate chapters nationwide

## The First Meeting

In addition to assessing interest, the purpose of the first meeting is to explain the goals/purpose of forming a chapter and the individual benefits to local case manager members.

The group elects or appoints a temporary chairperson, often the individual initiating the action.

The meeting should include networking opportunities and an overview of the national organization, the Case Management Society of America (CMSA).

The agenda for this meeting might include:

- ◆ Assigning a secretary to [record minutes](#) and attendance.
- ◆ An introduction to CMSA, its [History, Mission & Vision of CMSA](#) and benefits to case manager members.
- ◆ An explanation of what is required to develop and maintain a chapter.

## Membership Requirements

- ◆ All Members Join at the National level
- ◆ Local Chapter Membership is required if their mailing address is within 60 miles or 60 minutes of a local chapter.
- ◆ Full time students may join at a discounted rate (requires student ID), plus local chapter costs.
- ◆ Military members may join at a discounted rate. Chapter membership is optional for military members only.
- ◆ The local chapter establishes their chapter dues when they affiliate. They may vote later to increase or decrease dues and must inform National through a copy of the minutes this was voted on.
- ◆ ***Membership in CMSA is not required during Prospective Chapter Status.***
- ◆ An installment plan is available for National dues. See the membership application for details.

All membership dues are processed at the National Office and chapter dues are reimbursed in full to the official local chapter the following month. Dues are not collected for Prospect and Pending at the National level. They may elect to coordinate and track these dues locally until officially Affiliated.

## What start up cost will my chapter face?

Beginning chapters can usually expect to incur some expense for flyers and postage to notify prospective members of meeting activity.

Chapters may recruit corporate sponsors to offset some expense.

The only direct expense in becoming an official CMSA chapter is the [incorporation fee of \\$100](#) required by the Department of Regulatory Affairs in Washington D.C.

Local registration of your chapter as a foreign corporation (described later) may also require a small fee - generally about \$50.

Your chapter may also incur expense for the maintenance of a mailing list; office supplies; postage or to purchase checks/deposits slips from your bank.

Other ongoing expenses might include:

- ◆ Refreshments for your meetings
- ◆ Phone calls
- ◆ Meeting handouts
- ◆ CEU applications (contact CCMC for more information: [www.ccmcertification.org](http://www.ccmcertification.org))
- ◆ Yearly payment to the [DC registered agent](#), (approximately \$125 per year)
- ◆ [Two-Year Report](#) fee to Washington DC (\$75 every two years)

## How does the CMSA National Office offer support to developing chapters?

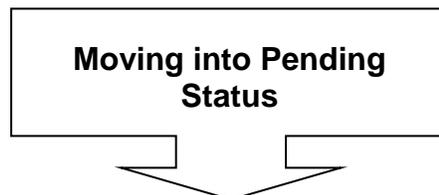
CMSA offers the support of a Client Services Rep to developing chapters for up to one full year. Prospective chapters are dropped after one year if the chapter has not moved to pending or affiliate status, or if progress toward that goal is not evident.

Evidence of progress could include:

- ◆ Solid goals
- ◆ Regular scheduled meetings/programs
- ◆ Membership recruitment
- ◆ Adoption of Bylaws and Affiliate Agreement
- ◆ Election of interim officers

## Final Steps in Initial Process

1. Developing a prospect list of members. National can provide you a list of CMSA members in your area to contact.
2. Developing meeting agendas and announcing the meeting at least two weeks in advance.
3. If you haven't yet done so, appoint or elect interim officers including a president, vice-president, secretary and treasurer.
4. At this point, officers are elected by most of the votes cast or appointed by consensus.



Means the group expresses enough interest to proceed with the process of forming an official CMSA chapter.

## Becoming a Pending Chapter

- ◆ Requires at least 15 -20 interested prospective members.
- ◆ Requires a vote recorded in [meeting minutes](#) to proceed with the affiliation process.
- ◆ The group officially notifies the [CMSA National Office](#) of their intent to proceed by submitting a copy of the meeting minutes.
- ◆ The group appoints a Nominating Committee so interim officers may be nominated and officially elected as outlined in the Model Chapter Bylaws. The Nominating Committee should prepare a slate and present it at a chapter meeting.
- ◆ The chapter establishes the amount of [local dues](#).
- ◆ The chapter submits Form SS4 to request a Federal tax ID number (see [www.irs.gov](http://www.irs.gov)).  
A copy of your IRS letter and Tax ID number should be sent to National.
- ◆ The chapter establishes a checking account and sends verifying information to the national office. *Do not use a personal social security number to set up an account.*

### Send verification to the National Office of:

- ◆ Account number
- ◆ Name and address of bank
- ◆ Copy of the federal tax ID number
- The next step involves alignment with CMSA. This includes adopting the Model Chapter Bylaws with any necessary amendments and adopting the Affiliate Agreement.
- A record in the [minutes of the meeting](#) in which the vote passed to affiliate must be sent to National.

## National Assists in Final Steps to Affiliation Process

### Model Chapter Bylaws

- ◆ The chapter in Pending status reviews the Model Chapter Bylaws.
- ◆ The chapter may vote to adopt as is or suggest amendments.
- ◆ Upon adoption at the local level, the chapter forwards bylaws (with suggested amendments) to the national office for approval.

### Affiliate Agreement

- ◆ This agreement outlines the responsibilities of both the chapter and the national office and describes the chapter territory.
- ◆ The chapter submits two original copies of this document to the National office.
- ◆ A copy is countersigned and returned to the chapter.

## Pending Status

- ◆ Chapters that reach "Pending" status are included on CMSA national promotional materials.
- ◆ Pending chapters also receive access to a list of members assigned to that chapter.
- ◆ During the Pending phase, membership is not required, however, it is encouraged. Although chapters in Pending status cannot receive dues reimbursement from the National office, if submitted, local dues will be collected and held for the chapter.
- ◆ ***Once the chapter becomes official, all collected dues will be forwarded to the chapter Treasurer.***
- ◆ Encouraging members to join CMSA National and the local chapter during the pending phase can help the chapter develop a treasury.

## How does my chapter establish dues?

1. Dues for CMSA chapters vary greatly from \$10 to \$50. Chapters develop a dues structure based on business costs and whatever fee the membership will support.
2. Dues must be established by the time the chapter becomes official and any change in dues must be reported to the National Office.
3. Once the chapter is official, the CMSA National Office will invoice members for national and chapter dues renewal.
4. During the **Pending** period, any chapter dues that are received at the National Office will be allocated to the chapter and held until the chapter becomes official.

## Can the chapter charge non-members who attend chapter meetings?

Yes, many chapters' charge non-members a fee to attend chapter meetings. It is encouraged to recognize your members by offering them discounted rates over the attendance rate. The difference should be enough to provide an incentive for non-members to join. Even if your meeting is fully sponsored, you should charge a fee for non-member attendance.

## Are we ready to affiliate?

- ◆ **Incorporation Fee of \$100** - Once you've submitted the model chapter bylaws and completed affiliate agreements to the National Office, the chapter must remit an application fee of \$100 and...
- ◆ **Officers** - Appoint or elect interim officers if you have not already done so. A list of names and addresses must accompany the application fee. (Please note, addresses must be street names, PO Box numbers are not acceptable.)
- ◆ **Membership** - Chapter officers must be members of CMSA National and the local chapter at this point in the process.

## What happens once we've completed all these steps?

1. The CMSA National Office takes over the affiliation process.
2. Upon approval of the Chapter Bylaws and Affiliate Agreement, the National office submits both documents along with the Articles of Incorporation to the Department of Consumer/Regulatory Affairs in Washington D.C.
3. Once approved in D.C., a certificate of Incorporation, and copy of the articles of Incorporation will be issued to the CMSA National Office.
4. The National Office forwards a copy of each to the Chapter. The original Articles of Incorporation & Certificate remain at the CMSA National Office.

## Are we an Official Chapter Yet?

Yes, but we still have a few steps to complete the process.

### The National Office will verify receipt of:

- ◆ Chapter Bylaws
- ◆ Affiliation Agreement
- ◆ Chapter Officer Names and Addresses
- ◆ Bank account information
- ◆ Federal Tax ID number

Membership in CMSA is required at this time.

Monthly chapter dues reimbursement will commence the following month. Checks are mailed by the 20<sup>th</sup> of the month.

## **What about Tax Exempt Status?**

The National Office has taken care of that for you. CMSA National includes each chapter under our federal tax group exemption number (GEN) and reports to the IRS each year which chapters fall under it. Each chapter needs to file individually with its state for tax exempt status.

To remain under the CMSA National umbrella, there are some financial guidelines the chapter must follow. Financial requirements of the chapter are detailed in the Chapter Treasurer's Guide.

As a 501(c)(6), you are exempt from Federal Tax exemption but not Sales Tax exemption. Also, donations/contributions are not tax deductible, as we are not a charitable organization. Dues can be deducted as a business expense only.

## **Local Requirements**

1. Chapters must operate according to their duly approved Chapter Affiliate Agreement, Chapter Bylaws, and all federal and state laws governing the operations of non-profit 501(c)(6) corporations.
2. After becoming affiliated in D.C., the chapter must file as a foreign corporation within the state in which it resides. It is important to file with the State immediately upon receipt of your Articles of Incorporation. A delay in this registration may mean additional legal expense to the chapter.

## **Must our chapter mirror the National fiscal year?**

Yes, for accounting & tax purposes, your fiscal year runs from January 1 – December 31.

## **Must I be a Case Manager Member (type A) to hold local office?**

- Yes – Currently, only "A" members may hold office according to the Model Chapter Bylaws and national Bylaws.
- Associate "B" Members, however, may be appointed as Committee Chairs. Both types of members have voting privileges.

**Note:** See the Bylaws' Special Membership category which may allow for an Associate member to hold office through a special vote.

### **What guidelines are established to form committees?**

According to the Model Chapter Bylaws, the chapter president, with approval of the Chapter's Board of Directors must appoint Nominating and Membership Committees. See the Model Chapter Bylaws, Article X; Sections 1 & 2 for details. All other committees are optional.

### **How do we elect officers?**

The officers that preside over your chapter in the Pending (non-incorporated) stage are appointed or elected by consent of the membership.

Once your chapter receives the Articles of Incorporation, official elections must be held, according to the nomination process outlined in the bylaws.

For more specifics on Officers and Board of Directors, please refer to the Chapter Bylaws' Articles VII and VIII.

### **How does my chapter keep track of its membership and dues?**

The CMSA National office sends produces chapter membership reports that can be accessed online by designated officers. This report includes a new member address list as well as a current membership list. The treasurer also has access to download a report of members corresponding to the monthly dues payments.

### **What about certification and contact hours?**

CMSA is the professional association for case managers. Certification is handled through various certifying bodies. For information about certifications, contact hours or the application process, contact the certification bodies directly. A list of certifying bodies can be found at on [CMSA's website](#).

### **Can our chapter ever change its boundary?**

The Affiliate Agreement outlines your chapter's boundaries and is a binding delineation of territory. The CMSA National office reserves the right to alter boundaries as needed as long as the Affiliate is given 60 days notice, and the new territory does not conflict with an already existing chapter. The 1996-97 Board approved the following addition to the national bylaws regarding chapter boundaries:

Boundaries may be redefined at the written request of the members, in consultation with the existing Affiliate and approved by the Society's Board of Directors. New affiliate formation will be guided by the Affiliate Agreement and when the society and sub-region members agree.

## **When can my chapter design and use its own logo and letterhead?**

Before a chapter is officially incorporated, it may not use the National CMSA logo in any form, but is welcome to design its own. It may include the name "Case Management Society of America" on its literature, as long as the chapter has clearly expressed its intent to fully affiliate.



After incorporation, a chapter should use the national logo, along with its own, for everyday materials (letterhead, envelopes, etc). Chapters will print their stationary locally.

For special occasions, such as endorsements or conference brochures, the national logo must be shown if the local logo is presented. In these cases, the chapter must gain approval from the National Office to employ its logo prior to its use.

Chapters may design a local logo but cannot use an altered national logo while designing one.

## GLOSSARY OF TERMS

### Model Chapter Bylaws

Governs chapter activity and may be amended with approval from the CMSA National Office.

#### Bylaws include:

- ◆ Official Chapter Name
- ◆ Chapter Purpose
- ◆ Officers and Duties
- ◆ Number of Directors
- ◆ Number and Name of Special Standing Committees

Amendments to chapter bylaws can be more restrictive, but cannot be less restrictive than the National Bylaws.

### Model Affiliate Agreement

A binding business agreement between a CMSA Chapter and the CMSA National Office.

#### The Affiliate Agreement:

- ◆ Describes the chapter's territory
- ◆ Outlines the responsibilities of the affiliate chapter
- ◆ Outlines the responsibilities of the CMSA National Office

This agreement finalizes the relationship between the chapter and the CMSA National Office. Items to review within the agreement include:

- ◆ Grant of Charter – Describes the chapter territory.
- ◆ Membership – All members of the chapter must also be National members.
- ◆ Obligations of the Association  
*i.e., chapter educational program, membership materials, member publications, etc.*
- ◆ Obligations of the Affiliate – Sets forth the chapter's purposes and activities.
- ◆ Use of Trademark and Copyrighted Materials
- ◆ Separate Entities Indemnification Revocation or Surrender of Charter – Sets forth circumstances under which a chapter's charter may be revoked.

## Articles of Incorporation

Chapters must be established as corporations rather than as unincorporated associations at both the national and local levels. The corporate form of organization has the following benefits:

- ◆ Gives the chapter the greatest freedom of action, with minimal oversight from state government or courts
- ◆ Ensures the chapter will be recognized as a separate entity
- ◆ In the absence of fraud or failure to observe the requirements of corporate existence, insulates the incorporators, directors, officers and members from personal responsibility for liabilities of the corporation (although any individual who participates in wrong doing will be liable), actions or guarantees, for breaches of their fiduciary duty to the corporation, or for negligence in their management.

## Component Minutes

The secretary is responsible for maintaining an accurate recording of the business that occurs at all chapter meetings. Board and Meeting Minutes:

- ◆ are legal documents and can be subpoenaed?
- ◆ should be clear, concise and accurately reflect the business conducted
- ◆ are to be kept in file for the duration of the organization's existence
- ◆ should be accessible to the membership and outside upon request
- ◆ serve as a historical reference for decisions made by the leadership; including policies and positions adopted by the group.
- ◆ are useful guidelines for staff, and future officers and leaders
- ◆ make it possible to determine precisely what action was taken on a matter at previous meetings.

## Tax Identification Number

- ◆ The chapter must fill out Form SS-4 for the IRS to receive a federal tax identification number ([www.irs.gov](http://www.irs.gov)).
- ◆ The IRS will send a letter confirming your number.
- ◆ A copy of this letter must be sent to the CMSA National office.
- ◆ The chapter must have a Tax ID number to set up a checking account.

## State Registration Verification

Each chapter is required to register with its own state to do business as a foreign corporation and submit verification of that registration to CMSA National.

To complete this registration, the chapter must be in good standing in D.C. For more information on local requirements, contact your Secretary of State's office.

## **Bank Information**

The CMSA National Office must be copied on the chapter Bank name, address, phone number and account number. You will need your Tax ID number to set up a bank account.

## **List of Chapter Officers**

The chapter must maintain officers and submit officer updates to the National Office any time an officer change. Contact Client Services for an Officer Update Form; or visit the CMSA website on the chapter resource pages.

- ◆ Chapter Officers must be "A" members in good standing with CMSA.
- ◆ Both CMSA membership and term of office are critical.

**NOTE:** If the President or Treasurer's position becomes vacant or their membership expires, the CMSA National office cannot send chapter dues reimbursement or official chapter address lists until the positions are filled and membership is current.

## **Taxes**

See Chapter Treasurer's Guide. A copy is available on CMSA website.

## **Incorporation Requirements**

All CMSA chapters, along with the National Office, are incorporated in the District of Columbia. Incorporation is accomplished when the CMSA National Office files your Articles of Incorporation with D.C. The National Office creates and files your Articles of Incorporation. The Articles of Incorporation must comply with all requirements of the District of Columbia Nonprofit Corporation Act and contain the necessary wording to qualify your organization for federal income tax-exempt status.

The National Office files your Articles of Incorporation with the Department of Consumer and Regulatory Affairs in Washington D.C., along with a filing fee of \$100, which the chapter is required to pay. When the D.C. government approves the Articles of Incorporation, D.C. will issue your chapter a Certificate of Incorporation. The National Office will forward you this Certificate along with copies of your Articles, Bylaws, and Affiliate Agreement. These documents are very important to save.

Your chapter must also incorporate in the State that it is located as a foreign corporation. (Your chapter is incorporated in D.C. as a domestic corporation.) Most State laws require that you must register to do business in your own state. Because state's laws vary from state to state, it is the chapter's responsibility to register in its own state. The Secretary of State's office in your state can aid with the chapter in completing this process. Once you have registered as a foreign corporation, please notify the National Office.

## **Two-Year Report for Non-profit Corporations**

All chapters are incorporated in D.C. as a domestic corporation. In order to remain incorporated in the District of Columbia as a nonprofit association, all chapters must file a report with the D.C. government every two years. This report is called “Two-Year Report for Non-Profit Foreign and Domestic Corporations.” It is located on the D.C. government’s website at [www.dkra.org](http://www.dkra.org). The filing of this report keeps your chapter in good standing as a corporation. This report is due January 15 every two years. The cost to file this report is \$75. Even though it is the chapter’s responsibility to file this report, you may check with the National Office to see what year your report is due. When you file your report, please **make sure to copy the National Office on the report**, so that the National Office can know that it has been filed and that your chapter is in good standing.

## **Registered Agent**

The D.C. government requires that if your organization is not located in D.C., it must have a registered agent located in D.C. The registered agent that the National Office has hired to serve as the registered agent for the National Office and all the chapters is the National Corporate Research (NCR).

NCR will forward your chapter important legal documents such as the “Two-Year Report” discussed above. Each chapter is responsible for paying NCR an annual fee for services. Fees are subject to change annually but range about \$125. NCR will invoice you annually, and it is important that you pay this fee so that you will receive legal documents and comply with the D.C. law. CMSA will set up your Registered Agent for Washington DC when you affiliate. However, the chapter will need to check with their State to determine if they require a registered agent for Foreign Status. The chapter will be responsible for hiring a registered agent of their choice to represent them at the State level.

## Check List for CMSA Chapter Development Process

### 1 – 3 months:

- Hold First Meeting – bring awareness to healthcare community of interest and find participants to assist in forming a chapter and taking on leadership roles.
- Recruit 15 – 20 interested individuals willing to support work of chapter development.
- Send list of appointed Leaders, roles, & contact information to National Office.
- Create Committee to review bylaws & affiliate agreement.
- Create Committee to plan educational programs.
- Create Committee to recruit members and do public relations.
- Determine Chapter Name – send National Office copy of minutes.
- Determine Amount of Chapter dues – send National Office copy of minutes
- Chapter can request collateral from National to hand out to members.
- Chapter can request a list of national members in the radius of their forming chapter territory.

### 4 – 6 months:

- File SS4 form with IRS.gov for Tax ID number. Send copy of IRS Letter to National Office.
- Open Bank Account.
- Begin seeking sponsors to help offset program costs (meals, CE's, facilities, etc.)

### 6 – 12 months:

- Hosted three to four Educational Programs over first year.
- Send TWO copies of Approved Affiliate Agreement to National Office.
- Send copy of final chapter bylaws to National (electronically)
- Send National a check for \$100 for affiliation.
- Create Nominations Committee by six to eight months to create Slate of Officers to be elected for beginning of second year. Send results of election to National by completing the Officer Update Form. Slate of Officers must be current CMSA members to qualify for Office.
- Prospect Chapter may want to consider requesting a CMSA Ambassador to come and speak to members and prospect members about CMSA, the benefits, and how to get involved.

### 12 months:

- National will begin preparing Articles of Incorporation for Domestic Corporation in DC with the Department of Consumer and Regulatory Affairs.
- National Office will set up the Registered Agent for the National Domestic Status.
- Chapter will begin working with State to set up a foreign status.
- Chapter will set up a Registered Agent with State, if required.
- National will begin collecting dues for the chapter and adding fees to applications.
- Chapter leaders will be given access to obtain chapter member lists through website.
- Chapter eligible to assign a Chapter Liaison to the National Public Policy Committee and begin forming a local public policy committee.
- Chapters will be encouraged to attend CMSA National's Chapter Leadership Workshops held in conjunction with Annual Conference. One or two conference registrations can be awarded to your chapter upon request for support.
- After first year, Financial Reports and 990 Tax forms will be due by May 15.



# Application for New Chapter Development

Date of Application: \_\_\_\_\_

Proposed Region for New Chapter (list primary city for meeting):  
\_\_\_\_\_

Distance to closest CMSA chapter? \_\_\_\_\_  
City where that CMSA Chapter meets: \_\_\_\_\_

Name of primary contact: \_\_\_\_\_

Phone # of contact: \_\_\_\_\_

Fax # \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Email address: \_\_\_\_\_

Number of individuals/professionals helping with this startup: \_\_\_\_\_

Number of individuals that are currently CMSA or Chapter members: \_\_\_\_\_

The primary reasons and interest for chapter development in this area are: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Group meeting has been held to determine level of interest in becoming a chapter?  YES  NO

Date(s) of meeting(s) \_\_\_\_\_

Location of meeting(s) \_\_\_\_\_

***Please attach attendance list and minutes from meeting(s)***

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***For Office Use Only***

Date Received: \_\_\_\_\_

Approved to begin chapter development process:  YES  NO

Notes/Comments: \_\_\_\_\_  
\_\_\_\_\_

Approved by: \_\_\_\_\_ Date approved: \_\_\_\_\_