Guidance and Instructions

The chapter P&P template has been developed in a manner so chapters can use this document as a basis to build their own P&P and can be used by any chapter at their choosing. Use of the chapter P&P template is not a requirement. Chapters are free to develop their own P&P or use portions of the template that are relevant to their chapter at their choosing. The template is merely a guide to help chapter develop a P&P.

It is important that chapters have a P&P or written policies as needed to effectively run a chapter and provide for continuity over time from one set of chapter leaders to another. We suggest including procedures in your P&P, so chapter leadership are not reinventing the wheel every time a new officer or committee chair takes over.

RECOMMENDATIONS BASED N CHAPTER SIZE

It is recommended that you use the entire P&P; however, smaller chapters may wish to omit sections. Please edit any section as needed and add sections that are not covered in the P&P. Additionally, if you find a section that you feel has been left out please let CRC know so that they can add it to future versions.

HOW TO USE THE TEMPLATE

There are shaded data fields and control fields throughout the document. The purpose of these fields is to minimize editing time and to highlight the sections that will most likely need to be customized to your chapter. After editing the fields, the control fields will permanently disappear. You may need to eliminate the shading in the shaded areas using typical editing methods.

- [Company] – This is where you enter your chapter name, enter it once, and it will be populated throughout the document where this field exist.
- [Company Address] – This is for the state (i.e., Missouri) not a physical address. This will be populated throughout the document where this field exists.
- All other data fields are singular.

    When you hover over a data area, it will turn orange. Click on the field to edit it. See example.

Figure 1- Normal View

Figure 2 - Click on Field to Edit (Guidance is included)

- You can edit any and all other section manually as you would any other document.
- Don't forget to update the table of contents and renumber the document as needed after you are done editing and customizing the P&P to your needs.

INSTRUCTIONS

Step 1 – Look for [Company] and replace this field with the name of your chapter. It will populate throughout the entire document.

Step 2 – Wherever you see Click or tap here to enter text is a control field, please enter the appropriate information in the fields or delete them if they do not apply.

Edit the following sections as needed.

- ☐ **Section 1.3 – Procedure Definitions**
- ☐ **Section 2.3.1 – Continuity Plan**
  - o Enter where you will be storing your chapters data off-site in the cloud. You'll do this everywhere, "enter cloud-based storage location/name" is in this section.
- ☐ **Section 3.1 - Board Size**
  - o Enter the number of board members and directors. You may also need to edit the officers and add an executive committee if your chapter has one.
- ☐ **Section 3.3 and Sub-Sections**
  This section is where the roles and responsibilities or job description for each of the board members and committee members gets entered. Edit the sample as needed. Please note some of the positions also have an additional field called *Procedure:* Click or tap here to enter text. The procedure field is a significant field that you should consider using.

  It is essential not only to establish policies but record the procedure used so that a new officer, director, or committee member will not have to reinvent the wheel. (examples might include how you handle new applicants to join the chapter, the accounting process used, how the website works and what needs to be done to maintain it, etc.)

  Section 3.3.1 – General Membership
  - o Enter when dues are due and when your memberships expire if not paid.
  - o Enter where and how dues can be paid.

  Section 3.4.1 - Members
  - o Change the chapter name in this field. Next modify the list of member benefits that your chapter offers.

  Section 6.1.2 – Website Operation
  - o Website stuff: This is where you enter what needs to be changed on your website and when the officers, directors, and committee members change. Does the chapter have a permanent mailing address or does it change every time there is a new treasurer? ETC.
- ☐ **7.1 - Annual dues policy due date, late date, and scrub date**
- ☐ **7.2 - Late fees if applicable**
- ☐ **7.4 - Your chapter budgeting process** if you have one. If you don't you should consider adopting one.
- ☐ **7.4.3 Bookkeeping policy** if you have one.

PLEASE REMEMBER TO READ THE FULL DOCUMENT AN EDIT ANY SECTIONS AS NEED SO THAT OT BEST DESCRIBES YOUR CHAPTERS POLICIES. DELETE SECTIONS AND ADD SECTIONS AS NEEDED.