

# **A COMMON-SENSE GUIDE TO STARTING A QAI CHAPTER**



# Table of Contents

<b><u>CHAPTER NETWORK OF QAI .....</u></b>	<b><u>1</u></b>
MISSION STATEMENT .....	1
GOALS.....	1
CODE OF ETHICS .....	2
QAI AND THE CHAPTER NETWORK .....	2
DIRECTOR OF ASSOCIATION SERVICES .....	4
<b><u>INTRODUCTION .....</u></b>	<b><u>4</u></b>
BENEFITS OF FORMING A CHAPTER.....	4
SUPPORT SERVICES OFFERED BY QAI .....	5
TYPES OF CHAPTERS .....	7
<b><u>HOW TO GET STARTED .....</u></b>	<b><u>8</u></b>
WHO DO YOU CALL.....	8
FIRST STEPS .....	8
PROSPECTING FOR POTENTIAL MEMBERS .....	9
WHERE TO LOOK .....	9
GENERATING INTEREST .....	10
CONTACTING AND INVITING.....	11
DUES OR NO DUES.....	11
NON-PROFIT ORGANIZATION STATUS (USA ORGANIZATIONS ONLY).....	12
SUMMARY ARTICLE .....	12
BASIC REQUIREMENTS FOR SUCCESS .....	14
<b><u>LEADERSHIP STRUCTURES.....</u></b>	<b><u>15</u></b>
START-UP STEERING COMMITTEE.....	15
PERMANENT EXECUTIVE STRUCTURES.....	15
COMMITTEES .....	16
<b><u>INCREASING CHAPTER MEMBERSHIP .....</u></b>	<b><u>17</u></b>
PROGRAMS.....	17
OTHER MARKETING OPPORTUNITIES.....	18
<b><u>HELPFUL HINTS.....</u></b>	<b><u>19</u></b>
<b>APPENDIX A – SAMPLE CHAPTER BYLAWS</b>	
<b>APPENDIX B – CHAPTER NETWORK AGREEMENT</b>	

# CHAPTER NETWORK OF QAI

## **Mission Statement**

The mission of the QAI Chapter Network is to support and promote software quality, the quality profession, and the quality practitioner; and that quality concepts, ideas and methods are shared freely among all organizations. The Chapter Network is an association of voluntary service organization that assumes a leadership role in establishing an environment to promote Total Quality worldwide.

The Quality Assurance Institute (QAI) provides formal guidance through strategic alliances with local Chapters, in installing and improving quality practices within their Information Technology activities. Consistent communications and support are achieved by creating and maintaining an infrastructure to promote quality education and technology sharing among member Chapters which shall include government, education and private industry representatives.

## **Goals**

### *Promote the value of IT quality*

- Increase overall awareness of IT quality as a critical success factor in achieving goals throughout all organization levels.

### *Promote and support the IT quality profession*

- Advocate the recognition of IT quality as a profession locally, nationally, and internationally
- Develop quality leadership skills
- Promote the value of professional certifications sponsored by QAI
- Facilitate communication and sharing information among IQ quality professionals

### *Support the IT quality professional*

- Improve the competency and skills of IT quality professionals
- Assist the IT quality professionals in obtaining and maintaining professional certifications sponsored by QAI
- Improve employer recognition of certified IT quality professionals
- Support IT quality professionals during job transitions

### *Promote QAI Worldwide and the Chapter Network*

- Become the 'first choice' organization for IT quality information, certification, education, and networking
- Assist the Chapter Network in maintaining and building a strong local organization

## **Code of Ethics**

Chapters:

- Shall conduct themselves professionally, with truth, accuracy, fairness and responsibility.
- Shall work together with QAI and other members to promote the field of quality assurance in the information services industry.
- Shall endeavor to aid the professional development of the common body of knowledge for, and practice of, quality assurance.
- Shall promote and support professional certification.
- Shall not serve any private or special interest in fulfillment of chapter and programs and responsibilities.
- Shall work to improve the knowledge and stature of their membership.

## **QAI and the Chapter Network**

### **Limitations**

- QAI has no regulatory power over the Chapter Network. QAI will not dictate nor interfere with Chapter affairs or activities.
- QAI will offer support to Chapters in the form of training and education, marketing, communication tools, mentoring and limited financial support. For more specific information regarding support services offered by QAI, refer to the Chapter Network Agreement.
- QAI is not responsible for the activities of the Chapters. Each Chapter may be organized and run as the local membership deems adequate.
- Officers and Board members of local Chapters do not become members of QAI simply by being part of the Chapter leadership. Membership to QAI is a separate entity.

### **Chapter Operations**

1. Chapters determine their own officers and Board structure.
2. Chapters determine the types and number of their service offerings and events, based on the needs of their members. Chapters should hold a minimum of two meetings or events per year.
3. Chapters maintain their own membership database and membership requirements, including whether or not to charge membership dues.
4. Chapters maintain their own web site and publications.

## Chapter Requirements

1. The Chapter subscribes to the shared objectives described above.
2. The Chapter acknowledges that it is a Chapter of QAI Worldwide on the Chapter's website.
3. The Chapter only promotes the professional certifications of QAI.
4. The Chapter makes its members aware of QAI's classes, conferences, workshops, etc.
5. The Chapter has at least two identified officers from different companies and who are not related to each other. *Example: President, Secretary*
6. The Chapter is incorporated as a separate non-profit entity for liability purposes.
7. The Chapter follows the standard naming convention. (*See below*)
8. The Chapter provides information to QAI, including names of at least the board officers for contact purposes. Maintain contact information (using the report form found on the QAI web site) should changes occur.
9. The Chapter submits to QAI an annual Chapter Network Update by January 31st each year.
10. The Chapter must be organized for the benefit of IT Quality profession and not for personal or private gain.
11. Chapters should be incorporated as a separate non-profit entity. QAI suggests that new chapters incorporate under the previously established naming convention of "City Quality Assurance Association".

Example: Chicago Quality Assurance Association

This non-profit corporation name **CANNOT** utilize the QAI name brand. For example, QAI Chicago Chapter cannot incorporate as QAI Chicago Chapter Incorporated. QAI Chicago Chapter is the branding name where the corporation name is Chicago Quality Assurance Association, Inc. Both the chapter and QAI should maintain a degree of separation to protect both entities from the liabilities of the other.

12. Chapter's must pursue a "doing business as (DBA)" for the organization so banking and other similar activities can be conducted in the "QAI name of city ore region Chapter" name.

*Example:*

<p style="text-align: center;"><b>Chicago Quality Assurance Association, Inc DBA QAI Chicago Chapter</b></p>
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**NOTE: Corporation, DBA, and related issues may vary by state/province. Chapters should ensure compliance with appropriate governing law.**

13. The Chapter Network has a standard naming convention and a standard logo that went into effect February 2008. Formal name is QAI + city or region Chapter. An acronym can also be used like QAIxx. *Example:* QAI Chicago Chapter (QAIC) or Chicago QAI Chapter (CQAI), QAI Southern Nevada Chapter (QAISN) or Southern Nevada QAI Chapter (SNQAI)

### **Director of Association Services**

The QAI staff person responsible for bringing the Chapter Network together to share information and ideas is the Director of Association Services. The objectives of this role are:

- To provide a support structure for the Chapter Network, for new or start up Chapters, and issues relevant to existing or established Chapters.
- To facilitate the sharing of ideas between Chapters in the areas of educational opportunities, membership, fund-raising, speakers/programs, etc.
- To increase awareness in the QA community about the existence/benefits of Chapters.

## **Introduction**

### **Benefits of Forming a Chapter**

Chapters provide an opportunity to draw together professionals with similar interests in Quality. In any city or town there are usually many businesses and corporations that are involved in various quality initiatives. A local chapter can bring quality professionals together to share experiences and techniques which will not jeopardize their corporate positions, but rather, strengthen them.

Becoming a part of the QAI Chapter Network will enable you to expand these networking horizons to international proportions. Quality initiatives across the globe are taking on varied looks with emphasis on assorted quality tasks. By sharing information between the various Chapters, you are able to see benefit from the experiences of other professionals. Past experience shows that this information sharing has been of great benefit to many organizations and individuals.

Certified Quality Analysts and Certified Software Test Engineers obtain Continuing Professional Education (CPE) Credit Hours for attendance at Chapter meetings. Chapter Officers earn additional credit hours. Individuals and corporations become recognized as “quality oriented”, and the synergistic power of the organization is augmented by their association with the Quality Assurance Institute.

QAI will assist in planning your Chapter’s programming by providing information on available speakers, bringing classes/seminars to your area, webinars and pre-recorded educational opportunities, etc. Chapters can also sponsor and host QAI Seminars in their areas. This provides an opportunity for your Chapter to earn additional income as well as elevate your visibility in the community as a quality leader. QAI will work with the local Chapters to

determine the Chapter's needs and to address these needs through a variety of educational programs.

## **Support Services Offered by QAI**

### *Funding Support*

1. For promoting QAI's certification program, the Chapter receives a \$25 referral fee for each applicant who selects the Chapter on the certification application. This becomes effective with the implementation of on-line certification exams, which no longer require the Chapter to proctor the exams. The Chapter receives a quarterly list of applicants who entered the Chapter's promotion code along with the referral payment. QAI will process referral fees and send payment, along with the list of members who registered, to the Chapters within 30 days of calendar quarter end (March 31, June 30, October 31, and December 31).
2. The Chapter receives quarterly a \$25 referral fee for each new QAI member, who selects the Chapter on the QAI individual membership application. The Chapter receives a \$100 referral fee for each new corporate membership, when the Chapter is selected on the corporate membership application. The Chapter receives a quarterly list of applicants who selected the Chapter along with the referral payment.
3. The Chapter receives 5% of the revenue from people attending a publically scheduled QAI class or workshop, when the Chapter Co-hosts the event. Co-hosts of an event are asked to assist QAI in locating a venue, travel arrangements for the instructors, and promoting the event. The Chapter receives a quarterly list of these attendees who entered the Chapter's promotion code along with the referral payment.
4. For new start-up Chapters, QAI serves as a sponsor and funds pre-approved start-up expenses. (Requests for funding support should be submitted in a timely fashion and must be approved in writing by QAI prior to the event. Examples of activities supported by QAI are mailings, marketing, events, etc.)
5. For Chapters having financial challenges, QAI serves as a sponsor and funds pre-approved programs, meetings, or activities of the Chapter. Sponsorship requests should be submitted in writing, a minimum of thirty days prior to the event or activity. Sponsorship requests are granted on a case by case basis, and require written approval from QAI.

### *Chapter Marketing Activities Support*

1. The Chapter is listed on the QAI web site with a link to the Chapter's web site. (See "Chapter Website Support" for additional information on QAI hosting services.)
2. The Chapter is listed in the QAI Journal.

3. QAI will send broadcast emails to all QAI members and certified professionals within the Chapter's geographical area, upon request. The Chapter may provide the material to be distributed or may request a standard Chapter Network informational email from QAI. These collaterals will include information specific to the local Chapter.
4. When requested, QAI assists the Chapter with marketing activities to help increase the Chapter's visibility and membership. This service is offered on a case by case basis, and is based on the individual needs and capacity of the Chapter.
5. QAI will produce a Chapter Marketing Guide annually, to assist the Chapters in promoting their programs and services. **(available 4<sup>th</sup> Quarter 2008)**

#### *Chapter Programs, Meetings, and Training Support*

1. QAI maintains a Speakers Database of potential speakers for Chapter's programs or meetings. It includes speakers who will do a webcast of their presentation. Both QAI and the Chapters recommend speakers for the Speakers Database. **(available 2<sup>nd</sup> Quarter 2008)**
2. QAI arranges a minimum of 1 speaker per year for a Chapter meeting at no cost. This is subject to scheduling availability.
3. QAI provides 4 pre-recorded webcasts and/or recorded conference sessions annually, one per quarter, to the Chapters that can be used to supplement physical speaker meetings to reach out to members who cannot attend meetings. These could be offered by the Chapters as 'Lunch & Learn'.
4. QAI brings classes/seminars to the Chapter's city/area based on the Chapter's determination of members' interests and meeting the minimum attendance. Classes/seminars may be either co-hosted or sponsored by the Chapter.

#### *Chapter Discounts*

1. Chapter members receive a 10% discount or 1 year free QAI individual membership when registering for QAI classes, workshops and conferences. The Chapter will receive a list of the people who designated their Chapter when registering.
2. Chapter officers receive a 20% discount when registering for QAI classes, workshops, and conferences. The Chapter will receive a list of the people who identified themselves as the Chapters' officers when registering. QAI provides a complementary QAI membership to all Chapter officers for the duration of their term.
3. Chapter presidents are invited annually to QAI's conferences and are provided one complementary conference registration. The Chapter's president can designate a delegate. A chapter networking event and/or Chapter president's coaching occurs at the conference.

### *Chapter Communication*

1. A Chapter mentor is available to support Chapters in their needs including coaching based on the stage the chapter is within its lifecycle. Mentoring arrangements are facilitated by the Director of Association Services.
2. The Chapter officers receive a quarterly newsletter to keep Chapters up-to-date on activities and changes within the Chapter Network, QAI, and Software Certifications. **(available 2<sup>nd</sup> Quarter 2008)**
3. The Chapter officers have access to a QAI website 'bulletin board' or 'chat room' to facilitate communication between Chapters. **(available 3<sup>rd</sup> Quarter 2008)**

### *Information Support*

1. QAI provides literature on certification, classes, conferences, etc. to the Chapters to disseminate at meetings based on the Chapter's quantity and timing needs.
2. QAI provides a guide on how to run a study group for the software certifications.
3. QAI has items (i.e. pens, folders, mugs, etc.) for the professional certifications. These items could be paid by QAI or the Chapter or the item could be purchased by the individual. These items can be used by the Chapter to recognize people who are certified. QAI will provide the Chapters a certification lapel pin for the Chapter to present to newly certified professionals.
4. QAI's website provides an on-line repository of articles, presentations, and reference sources that the Chapter members can access and contribute to. **(available 4<sup>th</sup> quarter 2008)**
5. QAI provides information to educate and convince management about the value of quality and to promote the value of the QAI certifications. The Chapter and its members can use this information to promote quality and the certifications. **(available 4<sup>th</sup> quarter 2008)**

### *Chapter Website Support (available 2<sup>nd</sup> Quarter 2008)*

1. Free web space is available for the Chapter's web site, if needed.
2. A standard template for a Chapter web site is available, if needed.
3. A basic website will be activated for new Chapters.

## **Types of Chapters**

You may choose to limit the scope of your Chapter, as described below, or to reach out to multiple types of quality practitioners. Regardless of the scope or orientation of your Chapter, the professionals brought together under your "roof" will promote addressing technological challenges from the quality perspective.

### *SQA Specific*

Some of our Chapters prefer to isolate membership to only those corporations and individuals that are involved with software development/maintenance.

### *General Quality*

Some Chapters address quality in all areas including software QA, manufacturing practices, health care quality, etc.

## **How to Get Started**

### **Who Do You Call**

Should you require assistance with any phase of establishing your Chapter, your first call should be to the Director of Association Services. As time goes on and you need additional assistance, feel free to reach out to other Chapters for additional assistance.

Another resource is the Chapter Network List. Use the information to network with other Chapters. Chapter websites are a good place to begin investigating what other groups are doing. Don't hesitate to ask their leadership "How successful are their activities?", "What is working for them?", "Have they already tried something you are thinking about doing?"

### **First Steps**

The most practical way to start a Chapter in your area is to identify a small group of people who are interested in working with you to get a Chapter going. You may know people at your place of employment, or through other professional organizations that you belong. Six to eight people is a good number to start with; it is the size group that allows you to get things done, but not too large as to slow down your progress.

You will want to hold some organizational meetings to determine the structure of your chapter, to elect officers and to identify the tasks needed to be ready to hold your first public meeting. Some of the types of decisions you will have to make for your Chapter include:

- Choose a name and DBA for your Chapter: (See Chapter Requirements for additional information)
- Chapter mission statement and Chapter scope
- Frequency of meetings – most Chapters meet monthly or every other month
- Day/time of meetings – depending on your membership, you may choose a regular meeting day (4<sup>th</sup> Thursday of every month for example), or may move your meeting days around to accommodate everyone. Meetings may be a few hours in the morning, around lunch, or after work hours. Some Chapters schedule their

meetings to last the better part of the day with a speaker in the morning and a workshop to apply the information you learned in the afternoon.

- Chapter leadership – What Board positions will you have? What will each position’s responsibilities be?
- Programs – How will you schedule programs? Will there be a person or a committee in charge of this?
- Members – What constitutes a member of your organization? Will you charge dues?
- If you decide to charge dues, how much will it be? Who will collect it and when? You will have to arrange to open a bank account and get a tax ID number for your group.
- Who will be responsible for the process of filing the corporation papers for your new Chapter? Remember, Chapters must be incorporated as independent non-profit organizations.
- How will you get the word out about your new Chapter? Are there local publications where you might advertise? Will you put together a mailing for your first few meetings and invite IT groups from local companies to come?
- Will you serve refreshments? How will you pay for them?
- How will you fund administrative items needed to run your Chapter (name badges, copies of your agenda and/or presentations)?

Some of these items are discussed in more detail later in this manual. Your core group may make decisions on many of these items initially and then poll your membership at a later date to identify their preferences. You may also choose to send questionnaires to prospective members in advance to obtain their input before the decisions are made.

There are many other questions that may arise as your Chapter matures and your membership grows. You should call on the Director of Association Services or other Chapters if you are unsure about some of these decisions. Remember however, that there is no right way to run a Chapter. Others have had success with operating their Chapter in a certain way, but that does not preclude you from success with your own methods.

## **Prospecting for Potential Members**

### **Where to Look**

The following list contains suggested sources of names of companies, which may provide potential members for your new Chapter.

- Newspaper - classified ads for your scope area or business agenda section for similar organizations (i.e.: DPMA, IEEE, etc.)
- Trade Magazines/Newspapers (for ideas of types of businesses to contact)

- Internet
- Phone Book (Yellow Pages/White business pages)
- Technical School Students
- Other quality-related or IS-related organizations
- Members of local Chamber of Commerce
- Mailing labels of CSQAs and CSTEs in your area (must request through QAI)
- QAI “Friends” labels for your area (must request through QAI)

As noted in the last 2 bullets, you may request mailing labels of QAI customers through QAI. You are responsible for requesting the zip codes for your area. This can be easily obtained via the US Postal Service website ([http://www.framed.usps.com/ncsc/lookups/lookup\\_ctystzip.html](http://www.framed.usps.com/ncsc/lookups/lookup_ctystzip.html)).

## **Generating Interest**

You don't have to start your Chapter with a large membership – so don't feel like you have to do all of your prospecting before your first meeting. Word of mouth is a great advertising tool, and after people attend your first few meetings, they will be telling all of their QA colleagues how valuable your Chapter would be to their personal and professional growth.

As you are prospecting, remember some of the basics of salesmanship. Avoid negatives during your conversations. Keep a positive mental attitude. Smile! Even if you're on the phone, your seriousness can be “heard”, but so can your smile.

It is usually better to make the initial contact in person or on the phone. Mailing a form letter will usually result in a very, very small rate of return. However, it can be useful to target specific organizations or to let a one-time visitor know that you have missed seeing them at meetings. Using the phone as a tool can be to your Chapter's advantage. Dividing up your prospecting list between your group will help with making the calls. Keep in mind that it is much harder to say “no” to a person face-to-face or on the phone, than it is to throw a letter or questionnaire in the trash can.

You can “cold call” organizations and ask for their CIO or QA Manager. You can also ask your members for names of people who might be interested in joining your Chapter. This “warm” approach sometimes works better, especially if you communicate that “Jane Smith thought you might benefit from attending one of our meetings and hearing the valuable information that we are providing our members.”

As you talk with people in your area, be sure you are clearly describing the purpose of your organization and specifying why it would be in their best interests to attend a meeting. If the person to whom you are speaking does not agree that this is a need, or already belongs to a professional organization, you must be prepared to respond to these types of objections. You may also have to deal with other objections such as not being able to get to ALL the meetings

due to work conflicts, may be out of town, etc. In general, guide this person into a position of support by providing enthusiasm and information about a common-interest topic(s).

You might conclude your call by obtaining the “correct spelling of your name” and “the proper address that will ensure you receive the information I will send to you”. Send some follow up information, in particular the details regarding your next meeting, so that they are reminded of your conversation.

Keeping a log of the companies you contact and the names, addresses and phone numbers of the contact person at each company helps to eliminate redundancy. Identify a few seriously interested individuals to target for leadership positions and consider a follow up, more extensive phone contact or a personal visit.

### **Contacting and Inviting**

Based on the number of prospects that you have to contact, you may want to phone your invitation for your first meeting. This will also provide you with an initial estimate on the number of people you can expect to attend. It will also give you a chance to rethink your schedule if you obtain an excessive amount of “excuses”, or to re-address their need for this sort of professional association. (re-sell the idea!)

In any event, follow up any phone invitation with a written invitation so those that you invite will have a written reminder of the date and time of the meeting. A written RSVP is also a good idea so that you can further “cement” their commitment, but not necessary unless you need an accurate headcount.

You may want to publish a notice of your meeting in the business section of the newspaper. Be sure to include time, place and a contact name and number for more information.

### **Dues or No Dues**

This is again, a matter of personal choice. Some Chapters do not, nor have they ever, charged dues. There are some that began that way and remain that way. Some started with no dues and are now considering charging, or have established a dues structure.

The best guidance that can be offered here is to meet your customer’s needs and expectations. If your members require the types of meetings (i.e. dinner meetings with noted speakers) that require cash expenditure, you will need to obtain those funds somehow. On the other hand, if you can survive long enough to get established by living off of the “donations/generosity” of member companies for meeting space, etc., by all means do so.

Consider that people tend to value the things that cost money. Also consider that if you handle money you will need all the pieces in place to do so. (i.e.: Treasurer, bank account, audit procedures, etc.) Listen to the wishes of your membership, and then seek the

appropriate professional guidance for your city or state. Examine your liabilities very carefully when you begin to “charge” for things.

### **Non-profit Organization Status (USA organizations only)**

Be sure to check with your local government to see what local restrictions may apply. They may also be able to put you in touch with a local representative of the Federal government. Contact the Department of the Treasury, Internal Revenue Service. The following documents will help you to file for this status:

- Catalog number 46573C
- Publication 557 (revised Nov. 1999)
- Package 1024 (revised Sept. 1998)
- Package 1023 (revised Sept. 1990)
- Form 872-C
- Section 501c(6) of the Internal Revenue Code
- Forms 8718 and 8817

### **Summary Article**

The following article outlines the thoughts and actions of Teresa Miller, then President of a former Jacksonville FL Chapter, as she worked to form that chapter in 1999. This article was taken from the January 2000 QAI Chapter Newsletter.

#### **Starting a Chapter**

If you have had a desire to start a QAI Chapter or split up a large area group, but have had reservations about doing so, take a moment to read this article.

Starting a QAI Chapter was less work than I had anticipated. What a joy! Starting a chapter is easier than you might think.

How do I get by making such a statement? I worked to initiate a QAI Chapter in Jacksonville, Florida. The initial steps did not take as much time as I had originally anticipated and worried about. I found that QAI had tools to help me get started. I also leveraged the knowledge from other existing chapters. Each person that I contacted wanted to be involved in getting an active chapter started in Jacksonville.

#### **First, find the people**

I knew I could not do this on my own, so I asked QAI if they could provide me with a list of member companies in my area. I planned to contact these companies and solicit interested volunteers to help. QAI did me one better and offered to provide me with specific names and addresses, as well as a Chapter Start-Up Guide.

The Internet saved some steps. QAI can provide mailing labels listing people in their contact database who match specific phone area codes. Before I knew it, QAI had sent me the

mailing labels. I transferred the names and addresses to a database of my own, added phone numbers and I was off! Piece of cake. And I thought it was going to be hard.

The Chapter Network Start-Up Guide suggests starting with a small group of people and lay the groundwork for the chapter. I contacted 10 to 15 people and had fairly good response. I lined up about 8 people for our first organizational meeting.

### **Second, develop a plan**

While the Start-Up Guide gave great advice, I can't forget the sister QAI chapter who offered tremendous help and filled in the gaps to the Start-Up Guide. We would not have moved as smoothly as we did without the help of CITQAA, the Charlotte NC Chapter, who has given us advice from the lessons they learned while starting their chapter 3 years ago. We have borrowed shamelessly from them.

I reviewed the Start-Up Guide, talked with CITQAA representatives, and made a list of the decisions we would have to make to get started. There are obvious things like:

- Chapter name and mission statement
- Meeting logistics
- Charge dues or not?
- How should the Chapter be organized (Board, Committees)?
- What is the focus for our Chapter and what kind of programs should we have?
- How do we find speakers?

But, once we started talking, we found there were many more questions to be answered before we were ready to have our first chapter meeting.

### **Third, organize**

We established a core group of people (around a dozen) to work through these issues. This information took us four monthly meetings to gather and document. So what am I saying? Be PATIENT. Don't get in a hurry. You will reap great rewards if you are not in a hurry.

One of the biggest hurdles, but also the most fun, was deciding on a name and mission statement for our chapter. We selected Jacksonville Information Systems Quality Assurance or JISQA for the name. Our mission statement is "To create an open forum for the exchange of Quality Assurance information, best practices, and education amongst Information Technology professionals."

Once we agreed on the basics, we identified Steering Committee members and held an election of officers to serve for the first year. We decided that our Steering Committee would have a President, Vice President, Secretary, and Vice-Secretary. Why not a Vice-Secretary to help the Secretary? There is a Vice President to help the President!

One of the key decisions we made was intended to give the committees a head start before going public. The core group outlined some objectives to get the committees started. We feel that it will take them at least 6 months to become an acceptable cohesive working group. The core group also decided to outline the programs for the first 6 months, rather than waiting for

the program committee to be formed and tackle that task. By having our first few programs identified, we can better market the offerings of our group and generate public interest.

## **Basic Requirements for Success**

Generally speaking, the type of Chapter that will be successful in your area is one that meets the needs of the members who make up the Chapter. As is true in every customer/supplier relationship, the customer may not always be right, but the customer is ALWAYS the customer. Without them we really have no reason for being in the business we're in. Some basic tips to start on the right foot and stay there include:

1. Be sure to ask questions pertaining to areas of interest when developing your prospecting questionnaire.
2. Including environmental questions (i.e.: type of business, type of hardware platforms, micro/mini computers used, types of networks, software [operating systems & tools] used, size and breakdown of employee base) may also lead to obvious "hot buttons" or areas of interest.
3. Asking what other memberships the employees or corporation may hold may also lead to interest areas. (i.e.: DPMA, ASQC and ACM could indicate strong interest in Information Systems, IAA would indicate Audit/Accounting interests and IEEE would point toward Engineering principles and statistics).
4. Maintain an active Leadership Structure. Retiring officers should be maintained in an advisory capacity to permit ready sharing of past experiences.
5. Professionally prepared newsletters and event flyers help your association to be recognized as a quality organization. Certificates of participation and appreciation for speakers and donors not only show that you care, but advertise your association when prominently displayed.
6. Provide value to your membership and their companies by offering programs, workshops, seminars and special interest group meetings. These are traditionally best done during the day. Dinner meetings, on the other hand, need a lighter touch such as motivational speakers. This is the best forum for "networking" and exchanging ideas.
7. Recognize and appreciate your CSQAs and CSTEs. Promote the certification program and work with QAI to sponsor Certification Exams.
8. Keep an up-to-date mailing list and eliminate those non-participants after a certain period of time. This will help you to concentrate on the interested members.

# Leadership Structures

## Start-up Steering Committee

The person who requested and received this manual is probably the most likely candidate for the initial Chair/President position. This is the “driving force” behind the Chapter and needs a person who is committed to seeing it through. They must be positive, energetic, tenacious and quality-minded. This person will be representing the “quality picture” to the community, therefore must have strength of conviction that quality principles are the building blocks of a stronger business community.

The Steering Committee/Chapter Board should be composed of at least three people, preferably from different companies. (But no more than 7 people because the more who participate, the longer the process will take). This will allow different “views” to be brought into the formation of the Chapter, which will be serving the various “views” of the business community. It will provide a number of different opinions and challenges to be met, rather than a singular view of experiences from within one company. It should also help “erase” any picture that may indicate a dictatorial position of a single entity, which might be trying to “mold the organization to their own needs”.

The Steering Committee should be prepared to “run” the organization for as long as 18 to 24 months because stability is very important when beginning. They will also be responsible for setting up the first few meetings, obtaining speakers and meeting places, developing the initial charter and establishing the general “ground rules” of the chapter.

The only other committee that should be formed from the process of the kick-off meeting is the By-laws Committee. By-laws, or Rules of Operation, describe the organization and must be established before you even know what other committees may be needed. Start slow. Plan. Be complete. Do a few things very well, rather than a lot of things haphazardly. Take the time to do the right things right the first time!

## Permanent Executive Structures

Some things to consider when planning the executive structure:

- Moderation - Don't appoint the entire membership to an executive or committee position
- Ongoing - Think ahead. You'll need to do this again next year
- Talent - Take advantage of special talents within your group
- Backup - Provide support for next year's executive group

One of the simplest forms of Chapter leadership is in place in the Orlando, Florida Chapter. There is one Chair and two Advisor positions that form the Main Body of leadership. These

people plan and run the meetings. The outgoing Chair assumes the position of “Trustee”, and remains in that position for up to 3 years or longer if the existing Executive Committee so desires. This ensures that the experience and knowledge gained through serving as Chair are not lost to the organization. The Trustee is available at all times for consultation and advice, and attends all Executive Committee meetings. After three years of operation in this mode, there are 3 Trustees lending their past experience and knowledge to the current Executive Committee. This provides a safety net for incoming officers who can call on the Trustees when needed.

Other Chapters have more sophisticated and involved structures. These may include numerous committees, each with a committee head. There is always the primary leadership position, which may be called Chair, President or another applicable term. There are usually subordinate officers in positions such as Vice-Chair, Vice President, President Elect (the one who will be President next year), Treasurer, Secretary, etc.

For example, the Charlotte, North Carolina Chapter elects a President, Vice President/Treasurer, and a Secretary. They also have 4 committees, each with a Committee Chairperson: Membership, Communications, Education and Programs. These 7 representatives form the Chapter Board. The Executive Steering Committee consists of the President, Vice President and Secretary of the Chapter.

The Steering Committee will need to decide on the form of government which will best serve the interests of the membership. Consideration must be given to the goals the Chapter has set to achieve, and what form of leadership it will take to make that happen.

The only caution here is to keep it as simple and “un-political” as possible. Remember the “Vision” to the is to openly and freely share quality concepts and ideas. This cannot be accomplished in a highly political or hostile atmosphere. If each member of the governing body considers the other members as friends and associates, the sharing and helping comes much easier.

Finally, consider the term of office. Most organizations re-elect after one year. There should be a limit on the number of consecutive terms that an officer may preside. One term may be too little and three may be too many. Your environment will determine your specific needs. Keep in mind that new people bring new ideas.

## **Committees**

In order to accomplish the goals of the Chapter and provide benefits for the members, many Chapters establish committees to organize specific areas of the Chapter or events for the Chapter. Some of the more popular committees include:

- Programs
- Membership
- Corporate Relations
- Community Relations
- Education
- Historical (Records)

- Finance
- Certification
- Interface
- Publicity/Public Relations
- Recognition/Appreciation
- Seminar

Your Chapter may choose to have specific responsibilities assigned to a Board member instead of creating a committee to serve the purpose. For example, your Secretary might also arrange for any recognition or appreciation due from your Chapter to a speaker or other donor.

In a small organization, a “committee” may be one person with special responsibilities. Don’t let committees become larger than their work required – large committees can grow unwieldy.

A sample set of By-Laws adopted by the Boston chapter is included as Appendix B to this guide. This provides some insight regarding organizational structure that may be adopted. However, this consideration is strictly up to the individual chapter.

## Increasing Chapter Membership

### Programs

For many Chapters, the key to success is the programs offered to Chapter members. Because of this, it is extremely important to schedule programs on topics that are timely and are of interest to your members. By frequently surveying your member base, you can keep up with the changing needs of your members and create valuable programs accordingly. Frequent surveys are a must, since your membership constantly changes over the course of the year.

Programs may consist of speakers, discussion groups, book reviews, vendor showcases or panel debates, to name a few. The format is not important as long as you are delivering value to your members.

The following article from a Chapter Newsletter suggests methods for securing speakers for your programs:

#### **Seattle, WA, USA Chapter’s Suggestions for Lining Up Speakers**

Many of our speakers are in-house attendee's that volunteer to give a presentation, or know of someone who often gives presentations. Since we have major companies such as Boeing, Safeco, Attachmate, Microsoft etc. in the local area, it is usually not too difficult to book speakers 6 months ahead.

The best way that we have found to find speakers is to go directly to the major software/hardware shops in your local area and first familiarize them with what your group does (Attempt to improve general overall quality in software and/or hardware). Then ask if they have anyone that has experience and interest in presenting information (in a non-biased way hopefully) to your user group.

The key is booking speakers and getting a firm commitment from them 6 or more months in the future. By doing that, it gives the speaker time to prepare a quality presentation.



## Other Marketing Opportunities

There are many creative ways to market your Chapter in your area, increase awareness and obtain new members as a result. Here are a few:

- Create a brochure – These can be used as handouts at your meetings, and for people to take back and distribute in their own organizations. You can include them in mailings (described below) or send them to people who inquire about your Chapter. They can be simple, black and white documents that you print yourself, or more elaborate, color creations that someone makes for you (you may need a budget for this, unless someone donates the service for your Chapter).
- Put together a mailing – Look in the phone book, in the newspaper (classifieds) or on the Internet. There are many sources for potential members. Put a list together, write a letter and mail them. You will be surprised at the response. If you mail 25 letters and get 2 new members, you’ve got almost a 10% response rate (that’s not bad for a mailing)!
- Participate in a local IT event – Maybe there is a technology job fair or a technology expo being held in your area. You may be able to get a free booth in exchange for arranging a speaker for the expo. Your booth could feature information about your organization. Don’t forget to have ‘trinkets’ to give away – that is always a draw!
- Create a website – Most of you already have one of these, so you don’t need to hear how critical it is in this day and age. QAI provides a basic website for new chapters. When you are ready, you will be responsible for the content management of your site. In addition to being a source of information for potential members, it can help your existing members as well with meeting logistics, etc.
- Partner with other local IT or Quality organizations – This is a great way to share expenses as well as members! Although it’s additional work to coordinate with other local groups, the benefits outweigh the drawbacks. This approach may be more valuable during National Quality Month in October.
- Use your members – the, Membership Committee Chairperson for the Jacksonville Chapter said, “Our members are our best advertisement.” If your members are happy with the benefits your Chapter provides, they should be vocal about it to their colleagues and friends in the industry.
- Create business cards for your local Chapter.
- Include your QAI affiliation in presentations you give at conferences or other public meetings. Have Chapter business cards to give out.

- Mention your QAI Chapter in classes that you take or teach. Have Chapter business cards to hand out.
- Provide increased benefits to Chapter members such as soft copies of presentation materials or access to a restricted part of your Chapter website. These perks increase the perceived value of your Chapter.
- Hold a Bosses Night for the managers of those who are Chapter members. This is a great way to thank them for their support of your member's time and to show them first-hand, the benefits of participating in your Chapter's activities.
- Schedule a Vendor Day where vendors can specifically come to talk about their products. Individually invite people who may have a need for vendor's products but aren't Chapter members to attend.

Many QAI Chapters have used these ideas successfully. Contact the Director of Association Services to get in touch with some of these groups and hear what they have accomplished with their marketing efforts.

## Helpful Hints

- Keep the cost to a minimum, free if possible. Use donated company meeting rooms, donated school/college meeting space or community meeting rooms.
- Some people react more favorably to an organization that appears to be already established. If this is the case in your area, you will need to do much of the formative work with a selected few people so that a basic charter and at least some governing body is in place for your first meeting.
- Have leaders identified from prior conversations and work toward public commitment to serve on committees for the Chapter.
- Select a "Leader" whose strength and enthusiasm you can count upon. It will be this person that needs to motivate the other officers.
- Select a "Scribe" or "Recorder" to take the "minutes" of your initial organizational meetings and keep track of action items and assignees.
- Agree on a common vision for the Chapter. Why will you exist? No group can be all things to all people.
- If you decide on having a speaker address the kick-off meeting attendees, do not go overboard. **Remember that the expectation level you set at this meeting will be the level you are expected to maintain or exceed at future meetings!** Use sample Charter documents as a starting point for your own Chapter/s Charter. Don't try to start from scratch. It may be wise to select a Chapter Bylaws Committee to establish the Charter for your Chapter. Agree upon and elect the governing body of the Chapter.

- Set goals or objectives for each identified function (i.e.: Program Director finds speakers, Publications Director provides Newsletter, etc.) Make it clear that this is a team effort. You cannot do everything yourself and that if help is not received, nothing will happen.
- Notify QAI directly of the progress made and status of your new Chapter. Send the Chapter Update Form, currently available on the QAI web site at: <http://www.qaiworldwide.org/chapters/index.html>

## **Appendix A – Sample Chapter Bylaws**

## **Appendix B – Chapter Network Agreement**