

# CMSA Chapter Development Checklist

## 1 – 3 MONTHS:

- Hold First Meeting – bring awareness to the 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 the work of chapter development.
- Send a list of appointed Leaders, roles, & contact information to the 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
- The chapter can request collateral from National to hand out to members.
- The 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 a Tax ID number.  
*\*Send a 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 the first year.
- Send a copy of the Approved Affiliate Agreement to the National Office.
- Send a copy of the final chapter bylaws to National (electronically)
- Send National a check for \$100 for affiliation.
- Create Nominations Committee for six to eight months to create a
- Slate of Officers to be elected for the beginning of the second year.
- Send results of the election to National by completing the Officer Update Form.

*\*Slate of Officers must be current CMSA members to qualify for Office.*

# 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.*
- The chapter will begin working with State to set up a foreign status.
- The 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 the 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.
- After the first year, Financial Reports and 990 Tax forms will be due by May 15.