



IAP2 USA Chapter Handbook

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Welcome to IAP2 USA

IAP2 USA is a 501(c)6 membership organization with an elected [Board of Directors](#). The association carries out its mission to advance and extend the practice of public participation in ways that align with our [Core Values and Code of Ethics](#) and support our [strategic plan](#).

IAP2 USA chapters emerge when members take the initiative to establish them. Volunteers are supported by staff dedicated to meeting the needs of members and chapters. This Handbook is designed as a resource guide for chapters. In addition, reviewing the orientation [PowerPoint \(pdf version\)](#) may be helpful.

Chapter Resources and Services

Promotional Support: Chapter Webpage, Calendar of Events, Chapter Membership Lists, Members Only Directory

Chapter Management: Basecamp, Chapter Handbook, Annual Report Review

Chapter Leadership: Chapter Liaison Meetings, National Dialogue, Ambassador Program, Mentorship Program

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Promotional Support

IAP2 USA staff support the organizing efforts of existing and emerging chapters. Contact info@iap2usa.org for assistance. Regular support for existing chapters includes:

Chapter Webpages

Once a chapter's founding documents (agreement, charter and bylaws) have been approved by the Board of Directors, staff can create a webpage for the chapter. (Hover over "Chapters" in the top navigation bar for existing chapters; [more details](#))

Once created, each Chapter is responsible for maintaining the Chapter webpage. This is especially important after the election of new officers so as to update the roster of Chapter leaders. Staff are available to help you with technical issues and provide one-on-one training as needed.

Calendar of Events

Chapters can add events directly to the IAP2 USA Calendar of Events and feed them to their Chapter Webpages. Set-up can include registration types, confirmation and preset follow-up emails. IAP2 USA can collect the fees and distribute the funds to the chapters less any third party fees, e.g., PayPal. Setting up events at iap2usa.org is especially helpful for events with member and non-member pricing; [more details](#).

Members-Only Member Directory

The [Members-Only Member Directory](#) [login required] provides more detailed member information and can be filtered by chapter. At a chapter networking meeting you might demonstrate how the feature can be used to look up chapter members they have met at chapter events. Chapters should also encourage new members to add their photos and chapter volunteer activities to their member profiles. ALL uses of member directory information must comply with the association's [Privacy Policy](#).

Chapter Membership Lists

Lists of IAP2 USA members residing in the chapter's geographic area updated monthly and posted to the Chapter Basecamp folders by the 15th of each month.

Chapter Prospect Lists

In addition to the contact lists maintained by the chapters, IAP2 USA maintains a list of contacts who receive the IAP2 USA newsletter but are not members. Recruitment lists can be produced for chapters upon request based on staff availability.

Promotional Materials

Chapters and Emerging Chapters have access to marketing/outreach materials such as brochures, flyers, and model presentations. Staff can assist with limited development and/or tailoring as time allows. [Brochure](#) | [Postcard](#)

Proactive Chapter Promotion through IAP2 USA Communication Channels

Website, Newsletter, and Social Media

Each IAP2 USA newsletter includes a section for a chapter articles. Chapters are encouraged to submit announcements or articles - including short pieces with links to chapter blog posts - for inclusion. Longer articles can be posted to the IAP2 USA blog as well.

Chapters are encouraged to:

- Promote secondary outreach by including messaging such as *“If you have friends or colleagues in the greater <> region who might be interested, please forward this invitation...”*
- Promote chapter activities and events via IAP2 USA social media channels directly:
 Facebook - <https://www.facebook.com/IAP2USA>
 Twitter - <https://twitter.com/IAP2USA>
 LinkedIn - <https://www.linkedin.com/grp/home?gid=3846743>

Chapter Management

Basecamp

The Chapter Basecamp ensures everyone has access to the same information, allows users to control how they receive messages, and lets chapter leadership create projects for ongoing chapter committees and/or projects with specific time frames.

It would likely be helpful to communicate these benefits of Basecamp to your chapter leaders and volunteers:

- Basecamp allows you to control how you receive messages to reduce clutter in your email inboxes
- Everyone has access to the same information
- You can create projects for specific efforts
- The Messaging Board provides quick updates from other team members

In addition, staff created an “All Chapters” project to hold common documents, and support all chapters. Chapter Liaisons may contact info@iap2usa.org to add or remove other Chapter leaders from the All Chapters Basecamp project.

Basecamp Resources

- Watch the short videos at - <https://basecamp.com/learn>
(Watching all the videos should take less than a half hour)
- These How To Guides introduce various Basecamp features - <https://3.basecamp-help.com>
- And if you’re so inclined you can participate in a Live Q&A class - <https://basecamp.com/classes>

Once your chapter has access you will want to determine who has administrative rights to add/remove people from your primary Chapter Basecamp landing page, as well as the various projects.

Virtual Meeting Platform

If your chapter needs assistance with a meeting platform, please contact IAP2 USA staff.

Chapter Handbook

This Handbook reviews the core resources and services available through staff. It is intended to provide an introduction for new chapter leaders and is updated as new services or questions arise. Are you still looking for information not found here? Contact info@iap2usa.org.

Insurance

IAP2 USA maintains both Directors and Officers insurance and Commercial General Liability Insurance to protect its operations and volunteers. Some facilities require proof of General Liability Insurance for events. Documentation of the coverage can be requested by emailing info@iap2usa.org.

Chapter Agreement/Compliance

Chapters are fiscal extensions of IAP2 USA and are bound by all of the laws that govern 501(c)6 organizations. Staff provide the annual report forms with guidance on how to complete them, and can assist you when you have questions.

If a chapter collects money and pays speakers or other expenses, it must have an EIN number, bank account and file its own IRS 990, 1096 and provide 1099 forms to any contractor paid more than \$600 in the year. For information on the Chapter's IRS/Banking relationship, contact accounting@iap2usa.org.

Chapter Leadership

Chapter Liaisons

The Chapter Liaison is the “go to” person for IAP2 USA to contact when looking to connect with chapter leadership. The only exception is the request to complete the chapter annual report, which is sent directly to the chapter President in mid-January to early February and must be completed by March 1.

Chapter Liaisons attend the Chapter Liaison Meetings and work on behalf of other chapter leaders and volunteers to manage [administrative access](#) to the various resources and services. For this reason, staff need to have one person identified as the Chapter Liaison who is responsible for maintaining this information. Additional chapter members are welcome to participate in the Chapter Liaison meetings and are coded as backup in the [Chapter Leaders and Volunteers](#) spreadsheet, which Chapter Liaisons should keep updated on behalf of the chapter.

Chapter Liaison Meetings

The Chapter Liaison Meetings were created for information sharing and mutual support among chapters, as well as to facilitate communication between chapters and IAP2 USA. Additional chapter members or people working to support an Emerging Chapter are welcome to attend, especially when there's a topic of special interest.

Chapters are encouraged to:

- Organize/co-host joint virtual activities among two or more chapters
- Formally invite participants from other chapters to in-person and virtual events
- Request board representation at chapter events
- Share success stories during calls, or in person as possible

- Organize time at regional or national gatherings to connect with each other

Chapter Consultations

The IAP2 USA Board of Directors periodically consults with chapters to identify needs and opportunities for improved or increased chapter support. Chapters are encouraged to provide a report to the board of directors (in person at a meeting or a written report.) The 2020 Chapter Board Liaison is Tina Geiselbrecht and can be reached via info@iap2usa.org.

National Programs

Core Values Awards

The IAP2 Core Values Awards are a celebration of excellence in public participation. A panel of judges reviews submissions every year and the best of the best are recognized at the annual North American Conference and entered into consideration for recognition at the global level. [Learn more](#).

Branding Requirements

Chapters may use the [IAP2 logos](#), trademarks, and copyrighted material in the conduct of their activities in accordance with the IAP2 Federation [visual identity guidelines](#). The IAP2 USA or [Chapter logo](#) must appear on all chapter materials. Chapter logos have also been uploaded to Documents in the Chapter Basecamp projects.

National Dialogue

The Board of Directors created the [National Dialogue](#) program to help stimulate authentic dialogue across the country. Each year the program poses a different set of questions for the local chapters and communities to discuss. Input is submitted to IAP2 USA and an annual report is drafted to share the results of all related events.

The 2018 topic for discussion is “How and why the public should be engaged in highly technical and complex projects?” [Click here](#) to get the conversation started in your area. A 2020 topic is currently being developed., “Grab & Go” toolkits were developed to provide chapters with resources to use in developing their own dialogue programs.

Key Words: Develop your own programs!

It’s essential to know these resources were designed to stimulate creativity and make things easy. The Toolkits are intended to be a collection of resources without a mandate. Chapters can pick and choose what pieces work best for them and how far to go with the National program.

Ambassador Program

The IAP2 USA [Ambassador Program](#) was created to offer practitioners the tools, resources, and support to broaden the reach and implementation of good P2. The goals of the program are to:

- Raise awareness of what is good P2,,
- Support strategic alliance building, and

- Increase institutional support for P2

Ambassadors have the opportunity to be seen as best practices experts, engage in best practices conversations, collaboratively brainstorm opportunities and problems, and meet potential new clients. Individuals who wish to participate in the Ambassador program must be members of IAP2 USA.

If an Ambassador lives in your chapter, they may be helpful in developing programming. If no Ambassador lives within your boundaries, you might be able to invite one for a visit.

Mentorship Program

The IAP2 USA [Mentorship Program](#) connects those new to the P2 profession (mentees) with experienced P2 practitioners (mentors) who provide a sounding board, advice, and general wisdom on best practices and potential pitfalls. The form of the mentoring relationship is determined by the individual pairings, developing their own "Terms of Reference" and framework for the nine-month program.

This program not only provides additional learning and professional development opportunities for those new to the field, but also offers practitioners the opportunity to live part of IAP2's Code of Ethics: "Support of the Practice".

Individuals who wish to participate in the Mentorship Program must be members of IAP2 USA.

Benefits to chapters:

Promoting the IAP2 Mentorship program to mentors and mentees:

1. Establishes the chapter and IA2 USA as an organization that guides and supports professional development opportunities for the next generation,
2. Recognizes the wide range of experience among our members and pairs mentors and mentees with common interests, and
3. Helps set the tone of the chapter in the area you serve

The program generally opens for applications in the first few months of the year. Watch for updates in the bimonthly newsletter. If you or another member of your Chapter would be interested in supporting the program, contact Executive Manager [Gail Madziar](#).

Support for Emerging Chapters

IAP2 USA strongly encourages the growth of chapters, and the energy and enthusiasm of the people involved. We offer a strong brand, unparalleled training, extensive networking, and promotional support for chapters, and a welcoming process to help you get started. Any group of IAP2 USA members can start a chapter in any area not already served by an existing chapter.

The basic steps are to:

[Step 1. Let us know you want to start a chapter!](#)

Email info@iap2usa.org and welcome aboard!

Step 2. Form a Local Organizing Committee

From the Member Directory and local lists let people know there is interest in beginning a chapter and invite them to be a part of the chapter planning process.

Step 3. Make it Official

Becoming a formal emerging chapter is a progression that begins with a signed [Letter of Intent](#). The Letter of Intent needs to be completed by the Steering Committee and approved by the IAP2 USA Board of Directors. Once approved by the board, the Emerging Chapter may then use the IAP2 or IAP2 USA logos, call themselves by an official emerging chapter name and promote events and activities.

The signed Letter of Intent is required for staff to provide some of the services listed above.

When the chapter is ready to become a formal a chapter, the Steering Committee can complete and submit to the IAP2 USA board the final [Chapter Charter and Policies](#), and [ByLaws](#).

Step 4. Organize a launch event

Get creative. Know your audience. Collaborate with IAP2 USA to promote. Examples: IAP2 USA Greater Los Angeles launched with a series of monthly meetings featuring a July [luncheon with a guest speaker](#), an August [Happy Hour](#), and a September program on "[Turbo Charge your P2 Efforts with Social Media](#)"

Step 4. Promote, recruit, and organize!

Include in your launch event agenda time to kick-off the chapter by describing the plans you've made and recruit people to join you in your efforts. Work with your Chapter Mentor (see below) and/or staff to promote the event to IAP2 stakeholders in the region, then build on your success with future events.

[Check here](#) for a possible first organizing meeting agenda.

From your new beginnings, you will want to:

- Recruit and sustain a core team of volunteers
- Provide some kind of baseline programming (events, training)
- Build chapter infrastructure (e.g., contact lists, bank account if desired, webpage)

How staff can support Emerging Chapter efforts

These are the kinds of things IAP2 USA staff can do to support your efforts:

- Provide IAP2 USA brochures, postcards, flyers
- Provide IAP2 USA contact lists, including past, current members and newsletter subscribers ([details](#))
- Post events to the IAP2 USA website and facilitate communication between event organizers and registrants
- Promote launch events and activities through regular IAP2 USA communications channels
- Coordinate IAP2 USA training activities in the area.

While IAP2 USA can support your efforts, we cannot do the heavy lifting for you. You make the plans, you do the outreach to connect with other members in your region, you determine the level of interest and next steps moving forward.

Request a Chapter Mentor

Oftentimes chapters form with the support of a “Chapter Mentor” – someone who has been actively involved in the organization at the committee or board level.

A Chapter Mentor can help you:

- Develop goals and objectives and action plans to reach those goals
- Know when you’re ready to file a Letter of Intent (see above)
- Navigate the process to formalize your Chapter Agreement, Policies and ByLaws

A Chapter Mentor can help you reach out to local/regional IAP2 USA members and larger corporate members by:

- Introducing you to people in the region who might be interested to get involved or support your efforts
- Helping you recruit members from nearby chapters to host a program, i.e., be a “star” guest speaker to spark local interest

The Board Liaison is also here to help at info@iap2usa.org.

Additional Resources for Emerging Chapters

- IAP2 USA Chapter [Blog Posts](#)