



**Advancing Professional Construction  
and Program Management Worldwide**

## **CMAA REGIONAL CHAPTERS ADMINISTRATION MANUAL**

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## **Preface**

The CMAA (Construction Management Association of America), like most nationally based organizations of its type, has adopted the concept of local chapters in order to expand the benefits of national membership and broaden the scope of communication and participation within the Association. The success of this effort depends largely on the quality and effectiveness of local leadership. It is their willingness to commit the time and resources necessary to a sustained effort in managing the chapter organization that determines the outcome. CMAA, as a growing organization, can provide only limited support. At the same time, CMAA must ensure that its corporate obligations--both legal and financial--are met and its mission on behalf of its national membership is fulfilled.

To those ends this manual seeks to provide the required guidance while, at the same time, leaving to the chapters the task of developing creative programs and activities which best serve the needs of their individual constituencies. It is recommended that newly elected chapter leaders become thoroughly familiar with the contents of this manual, including the sections introducing the CMAA chapter concept and chapter formation, in order to better understand and be able to communicate the roles of CMAA and its chapters to both the membership and the design and construction community.

## **Introduction to CMAA Regional Chapters**

### **The National Agenda**

CMAA is a nationally based industry association that seeks to promote the interests of both its members and the CM industry by pursuing activities in which CMs share common objectives that are best attained by a collective effort. Activities such as setting standards, developing model contract forms, protecting the interests of the industry in the legislative and regulatory arenas at all levels of government, and promoting CM among owners, design and construction organizations, and the general public are all examples of the national agenda that has been established by the Association.

CMAA reaches out to the larger design and construction community in a general way through a network of relationships established by CMAA National, through its newsletter, and through the participation by CMAA's leadership in both public and private conferences and events. The Association offers its programs regionally, to make it accessible by both members and non-members who share an interest in CM-related issues and topics.

The Association also offers specific support to regional program efforts in two ways:

- CMAA National will assist local members in putting on periodic regional market seminars as forums for communication and business development. These seminars require the establishment of a local program steering committee, but do not require a permanent governance body or annual reports. CMAA National approves the proposed program and provides the logistical support for such seminars. One or more regional meetings may be appropriate as a preliminary step and testing ground for possibly establishing a more permanent regional chapter.
- CMAA National will assist in the formal establishment of a chartered regional chapter for CMAA members as the most direct form of outreach when there is assurance that the critical mass of membership and the capacity for sustained interest and leadership exists to maintain an active chapter of CMAA. Chapters are approved by the CMAA Board and an Affiliation Agreement must be submitted in accordance with requirements established by that Board. Regional Chapters are also required to incorporate within their primary State.

### **The Purpose of Regional Chapters**

The primary purposes of the CMAA Regional Chapter program are to extend the reach of the national organization through the active involvement of individual members at the local level and to expand the benefits of CMAA membership for those residing in areas that have adequate members and interest to support a local chapter effort.

The objectives of chapters themselves are defined in the Standard Regional Chapter Bylaws.

These include objectives that are essentially intended to further the mission of CMAA:

- Promoting and supporting the purposes and objectives of CMAA in the local design and construction community
- Promoting and encouraging the growth of CM and the improvement of CM practice
- Promoting CM through relationships with academic institutions and student organizations
- Providing regional activities for CMAA members

In addition, well-run chapter programs can provide valuable "association" benefits to members who actively participate. Personal professional development, networking with colleagues and owners, providing and achieving recognition, encouragement for students through scholarship fundraising, and mentoring entry-level professionals are all possible through local chapter efforts.

### **Policy Guidelines**

Chapters should function within the policy guidelines established by CMAA National, and they are expected to follow the standards established by CMAA when engaging in activities that promote the CM profession.

Chapters should not engage in political activity, particularly grass roots lobbying, independent of the national association. Political action on local issues should be undertaken in partnership and with the support of CMAA National.

### **Chapter Membership and Participation**

Because membership in a CMAA regional chapter requires membership in CMAA National, all currently active chapters have been established in major metropolitan areas where there are adequate members to sustain the leadership and program of the chapter. Chapters play a role in growing CMAA's membership, in part by directly recruiting chapter contacts, but primarily as a result of good chapter programs that fulfill their mission of expanding the value of CMAA membership through opportunities for local involvement and access to the market. In order to insure membership is given the consideration and attention necessary, CMAA does require chapters to have a Membership Committee as part of the governance structure.

Experience has shown that the requirement that all chapter participants be CMAA members and the necessity for chapters to be financially self-sufficient are sometimes in conflict. Chapter officers are sometimes reluctant to "police" the attendance at meetings and events to ensure that non-members are not taking advantage of dues-paying members and obtaining the benefits of membership for free. Good chapter programming and a consistent effort to promote the industry and the Association will go a long way to alleviate this problem.

## **Guidelines for the Administration of Regional Chapters**

These Guidelines are intended to assist Chapter leaders in managing the operations of their chapters consistent with policies of the Association and in meeting the reporting requirements of CMAA National.

The Guidelines are a working document. Any difficulties in understanding what is intended or in meeting any of the requirements should be discussed with CMAA National. When in doubt, call CMAA National for assistance.

Changes to the Guidelines will be discussed at the Regional Chapter Committee level to achieve a consensus in defining the problem and proposing a solution. Ultimately, all administrative changes must be negotiated and agreed to by CMAA National prior to adoption and implementation.

### **Introduction**

The Guidelines supplement the Regional Chapter Affiliation Agreement and the Standard Regional Bylaws by providing advice and information on the responsibilities of CMAA National, the CMAA Regional Chapters Committee, and the Regional Chapter. Additions or changes to these Guidelines may be issued during the course of the year and should be implemented as directed.

### **CMAA National Office**

The national headquarters of the Association is located in McLean, Virginia. The President & CEO is the chief executive officer, responsible to the Board of Directors for the operations of the Association. The President & CEO has primary responsibility for the administrative functions of the Association, including those involving Regional Chapters. Use of the term CMAA National in this document refers to the President & CEO and CMAA's national staff. To further assist the chapters, the staff position of Chapter Relations was created.

### **CMAA Regional Chapter Committee**

The Committee includes the members of the national Board of Directors. The chairman of the Regional Chapter Committee and the other members of the committee are appointed by the CMAA Chairman. The Regional Chapter Committee coordinates the activities of the chapters, monitors the health and welfare of the chapters, and makes recommendations on policies and procedures governing chapter operations.

### **Regional Chapter**

This is the local organizational entity approved and chartered by the CMAA Board of Directors. The basic purposes of the Regional Chapters are to:

- Promote and support the purposes and objectives of CMAA.
- Promote and encourage the growth and development of construction management as a professional service and enhance the quality of the construction management practice.
- Promote the development of Student Chapters and to function as a direct link between CM practitioners and academic institutions.
- Provide regional activities accessible to CMAA members.

## **Organization**

Each Regional Chapter reports to the CMAA Executive Committee through the Chairman, Regional Chapter Committee.

The Regional Chapter is responsible for conducting its operations within the guidelines of the Chapter Affiliation Agreement, the Standard Regional Chapter Bylaws, and any other direction provided by CMAA National.

CMAA National provides administrative support and operational guidance/direction, particularly with regard to fiscal, insurance, membership, certification, educational programs, and other matters requiring coordination with the national program.

## **Membership**

Membership requirements are set forth in the Chapter Affiliation Agreement and Standard Regional Chapter Bylaws.

Participation of non-members is permitted to the extent that the non-member participation serves the purposes of CMAA and is primarily related to the recruitment of new members and student chapters. However, ongoing participation of non-members, deriving benefits of the Association without paying dues, is prohibited.

Chapters can access an up-to-date list of its CMAA members in the appropriate geographical area at any time. Chapter members are designated each year by the Chapter President as Chapter Administrators and have rights to access the rosters. Not only should this list be a source of the new members who've joined, it should be the basis for deleting previous members who should no longer receive any benefits of membership. A Membership Committee should be fully involved in this process.

CMAA National and the Regional Chapters will cooperate on mutually providing information regarding prospective members.

## **Finance**

The fiscal year of the Chapter must conform to the fiscal year of the Association: January 1 - December 31.

CMAA is an Internal Revenue Code 501 (c)6, not-for-profit association, exempt from payment of federal taxes on revenue generated by activities within the expressed purposes of the Association. Under this code classification, CMAA may not receive contributions, which are charitable deductions from the taxable income of the donors.

"Dues payments may not be considered as charitable contributions but may qualify as business deductions" for members. The foregoing quotation must be prominently included in any solicitation or invoice for payment of dues.

The CMAA Foundation is established to service the Association's needs for an IRS 501 (c)(3) entity, allowing the solicitation of defined "charitable purpose" funds and their consequent deductibility as "charitable" donations. The primary purpose for the Foundation is educational, including fund raising for its scholarship program.

Regional Chapters are to establish appropriate checking and savings accounts for their financial accounts. This information should be submitted to CMAA National once it has been established. All new chapters must obtain an EIN from the IRS before a bank account can be opened. Federal tax exemption does not automatically grant tax exempt status with the chapter's State of incorporation. Each Regional Chapter is responsible for contacting its State taxing authority for guidance and forms. In many instances, though, the State will follow the Federal exemption status.

CMAA National can at its discretion offer, free of charge, an online subscription to QuickBooks to aid in the maintenance of financial recording. If the Regional Chapter chooses not to utilize this software, another adequate method of maintaining an appropriately detailed chart of accounts must be kept. Regional Chapters are to also maintain income/expense records and generate reports specific to major events, such as seminars, etc. A complete record of payments made, to whom and for what, as well as a list of deposits and their source and purpose, must be maintained by each Regional Chapter.

Chapters may charge dues as set forth and approved in the Affiliation Agreement and/or a standard cost for each meeting. However, payment of dues is not a condition of membership in the Regional Chapter. Chapter dues and/or assessments at meetings are determined and collected directly by the Regional Chapter.

Financial information is to be submitted to CMAA National as a part of the mandatory Annual Report, as explained in the Reports section of these Guidelines.

### **Chapter Activities and Events**

The Regional Chapter Board of Directors must formally approve all Regional Chapter events and activities.

The proprietary use of the Regional Chapter, a Regional Chapter event, or the co-sponsorship with a Regional Chapter by a firm or individual is a violation of the professional ethics standards of CMAA and as such is prohibited.

All events sponsored by a Regional Chapter should involve the active participation of a broad spectrum of the membership.

### **Public Relations**

CMAA National has the responsibility for the communication of CMAA policies and positions on issues of general interest to the CM industry. Regional Chapters should support CMAA National in this responsibility and the Regional Chapters are to coordinate any public relations type of activity with CMAA National before participation.

Responses to local or state political, and/or judicial issues on the spectrum of CM interests are to be coordinated with, or preferably handled by, CMAA National.

The use of the CMAA logo or the name "Construction Management Association of America" by a Regional Chapter, or any office or member communicating on behalf of the Chapter, must always include the name of the Regional Chapter.

The Regional Chapter should establish an address for the receipt of mail. The address could be a post office box, the address of the Chapter President, Secretary, or other officer of the Regional Chapter. This address must be kept up-to-date as the officers change.

### **Insurance**

Regional Chapters are not covered by CMAA for general liability insurance. Chapters, as incorporated entities, may apply for this insurance on their own either through CMAA's insurance broker or through a local insurance broker/agent in the chapter's state of incorporation.

Regional Chapter events such as regional seminars and sporting events, attended by CMAA members and non-members, must be covered by separate liability insurance provided by the chapter through the CMAA National vendor or its own resources. In either event, the Regional Chapter will be responsible for the insurance costs. Consideration should be given by chapters that conduct many projects/programs/events during the year requiring separate insurance to secure their own general liability insurance as it may become financially prudent.

Duly elected officers of the Regional Chapter are covered under the CMAA National Directors & Officers professional liability insurance policy in accordance with the terms of the policy in the discharge of their duties, provided that their activities conform to the requirements of the Regional Chapter Affiliation Agreement, the Standard Regional Chapter Bylaws, and/or the Guidelines for the Administration of Regional Chapters. However, that coverage is for a total of \$1 million for all 28 chapters and the National office. Consideration should be given by the chapters to securing their own D&O insurance.

### **Reports**

The following reports are to be provided by the Regional Chapters for review by the Regional Chapters Committee, and (if noted) the CMAA Board of Directors.

- Annual Report/Chapter of the Year is an annual mandatory filing for all Regional Chapters and is to be submitted using the specified format (See Appendix A). The Report is due in mid-August each year and covers the period from August 1-July 31 of the previous and current year.
- IRS-filed Form 990 or electronic 990N filing will be required from all Regional Chapters regardless of the amount of the Chapter's annual revenues. This filing takes place annually with the IRS and is mandatory. Failure to file can result in financial penalties and even revocation of exempt status.

- Chapter of the Year Award is a voluntary recognition program and is judged using the criteria and information found in the Annual Report. In submitting for this award, the Regional Chapters are divided into five “population” divisions: 100 members or less; 100-200 members; 200-400 members; 400-700; and more than 700 and the judging will be done in those categories. The Regional Chapters Committee will serve as the judges and are empowered to select other categories of awards for presentation to Regional Chapters that excel in specific areas of chapter management.
- Such other reports as may be required by the CMAA Board of Directors. Requests for any other reports will be given with sufficient notice for providing the information by the stipulated deadline.