CLM

CHAPTER GUIDELINES

2023

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The Mission of CLM Local Chapters is to create opportunities for CLM members and prospective new members to participate in educational and networking programs in the local markets.
CLM Local Chapters are expected to hold up to three events annually with at least one of the events to include an educational component.

The Chapter Guidelines include all the information CLM Local Chapter leaders need to manage the event planning and delivery process.

Planning Chapter Events

The Local Chapter will be responsible for coordinating and organizing all matters related to the event, i.e., venue, speakers, educational component (if applicable) and sponsors, when needed.

Date Selection

Dates for CLM Local Chapter events must not coincide with any national or regional CLM event, otherwise referred to as blackout dates. For a complete list of events please access the CLM website. Events should be planned no less than 90 days in advance to ensure adequate time is given to secure sponsorship and to obtain CE/CLE credits for the educational component to the event (if necessary).

Sponsorships

After date selection, CLM Administration must receive a completed Local Chapter Event Form with the event date, confirmed sponsors' contact information and speakers (if an education component is included**.)** Each event must have a minimum of 2 sponsors and is limited to 8, with no more than 2 sponsors from competing organization**s.** Each sponsor is required to be an active Member or Fellow of the CLM. The Local Chapter Leadership and/or the CLM Sales Team are responsible for obtaining the sponsor's logo and forwarding to CLM Administration.

Tier 1: General Sponsor Level - $1,000 per event
General Sponsor Level- $ 1,250 per event for chapters (Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle)

Sponsor benefits:
1. Sponsors may send up to 2 people per event.
2. The sponsor's logo displayed on invitations.
3. Listing on the CLM website event and registration page.
4. Signage at the event and a table for marketing materials (if applicable).
5. Sponsors are provided an attendance list pre-event. The final list will contain email addresses.

Tier 2: Supporter Level Sponsor- $600 per event
Supporter Level Sponsor-$800 per event for chapters (Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle)

Sponsor benefits:
1. Sponsors may send 1 person per event.
2. The sponsor's logo displayed on invitations.

3. Listing on the CLM website event and registration page.
4. Signage at the event and a table for marketing materials (if applicable).
5. Sponsors are provided an attendance list pre-event. The list will contain postal mailing addresses. * (no emails)

Local Chapter Annual Sponsorship - 3 events ($2,250) OR 4 events ($3k) ($750 per event)
3 events ($3,000) OR 4 events ($4k) for chapters (Chicago, Dallas, Denver, North New Jersey, New York Metro, LA, Orange County, San Diego, and Seattle)

Chapters may elect to choose 4 events for their annual sponsorships if they have hosted 4 events in past years and can obtain commitments for success.

Benefits of Annual Sponsorship Include:
1. Sponsors may send 2 people per event.
2. Company logo on the selected Local Chapter webpage and registration page throughout the year.
3. Company logo on selected Chapter event pages.
4. Company logo featured in selected event invitations.
5. Company logo and designation of Annual Sponsor at the event and a table for marketing materials (if applicable).
6. Sponsors are provided an attendance list pre-event. The final list will contain email addresses. *

*Any use of the pre- and post-conference lists will be approved & distributed by CLM administration.
*Annual sponsorships based on availability.

All confirmed sponsors are billed for the full sponsorship amount. Goods and services are not accepted in exchange for payment. Sponsors will receive an invoice and sponsorship agreement to sign via DocuSign.

Details may include:
- The location, date, and time of the event
- Time the sponsors should arrive to setup
- Any changes or event cancellation
- Items that are not allowed i.e., banners & booth-type marketing
- Table dimensions
- Parking instructions

Sponsors are permitted to bring some giveaways and a shared space should be provided for all sponsor materials. All sponsors are to be treated equally. Sponsors are permitted to do drawings for prizes with the following conditions:

- Winners do not have to be present to win
- The drawing does not become a focal point for the event to bring added attention to the one sponsor

Cost

The Local Chapter is responsible for determining the budget for the event and ensuring the event is sufficiently funded priority to making any financial commitments for the event.

The Local Chapter may work with the Sales Team to secure additional sponsors when the Chapter officers anticipated budget for the event and account balance requires additional sponsorship funding. The Local Chapter may determine the sponsorship funds required based on the anticipated cost of the event.

CLM chapters are not permitted to use Sponsorship revenue for charitable contributions. CLM encourages Chapter leaders and members to support and participate in local community service initiatives to serve those in need.

Sponsorship Agreements

The Local Chapter will provide CLM with a completed local chapter event form that includes a list of secured sponsors. CLM will send an invoice and Sponsorship Agreement to each sponsor for signature.

The Local Chapter may make financial commitments for an event but may not exceed the sponsorship revenue from signed Sponsorship Agreements. The sponsor's logo will not be added to the event webpage, email invitation or poster until the Agreement has been signed or the invoice has been paid.

Prior to the Local Chapter event, CLM will send confirmation of all sponsorship payments to the Local Chapter Leadership. Unpaid sponsorships secured by the Local Chapter may need communication from the Local Chapter. *All sponsors must be confirmed no less than 30 business days prior to the event date in order to be included on the event invitations and sponsor signage.*

Postpone/Rescheduling/Cancellation

CLM Local chapters should avoid cancellation of events. If an event needs to be postponed, rescheduled, or cancelled please advise your CLM Chapter event coordinator so that appropriate measures can be taken. Additionally, steps should be taken to renegotiate venue contracts and sponsor agreements. Attendees must receive postponement, rescheduling, or cancellation notices with additional posting on social media as needed, to ensure the information is received.

Selecting a Venue

The Local Chapter will select a venue commensurate with the type of event scheduled.

Networking Event

For a networking only event there are many options. With all options, it is best to keep people moving. For cocktail-type events a few high top tables and bars will aid the flow of the event.

Education and Networking

Some locations charge room fees. Keep this in mind when you are setting up your event. There are ways to be creative. For example, have the front of a larger room set for the education and have the back set for networking.

- For most events, microphones should not be required for speakers
- Set the room theater style (chairs without tables)
- If AV is required for PowerPoints, many law firms have projectors and screens for presentations. See if one of the Local Chapter Leaders has AV available for use at the event. This will save you considerable funds.

Food and Beverage

One important note to keep in mind is attrition. When giving your final counts, please be sure to subtract this attrition number from your food and beverage counts to avoid paying for people that will not be in attendance.

- If you would like to do a meal, plated meals are typically less expensive.
- During the meals, have iced tea on the tables in pitchers and do not serve bottled beverages like soda. This will save you a considerable amount of money.
- Bars on consumption can be less expensive. Do not opt to have a bar package per person as many people will only have 1 drink and some do not drink at all.

Contracts

Payment

Event locations will require some form of payment. The available forms of payment are AMERICAN EXPRESS and check. The credit card authorization can be submitted via a secure link from the venue and kept on file for final payment. If credit card payments are not permitted, CLM will arrange for payment by check.

A W9 must be obtained from the venue to process a check payment. Except for minor expenses (name badges, posters, printing), all payments will be processed by CLM. Local Chapter leadership must ensure the cost of the event, including venue cost, is covered by sponsor revenue as reflected in signed Sponsorship Agreements received by CLM.

Expect the following typical charges:
- Venue charges, including any taxes, service charges, etc.
- Food and Beverage, including taxes, gratuities, or other services charges
- Name Tags
- Printing of Poster
- CE and CLE charges – to include event filing and credits for each requiring attendee

Upon completion of the event, if there are any expenses paid out by the Chapter Leadership, please forward the receipt or invoice to CLM Administration by completing the reimbursement request for prompt reimbursement via the CLM website reimbursement portal.
https://www.theclm.org/Member/LocalChapterAccounts

Education

The education portion should be geared towards a well-rounded audience. For example, negotiation strategies, Medicare compliance, large loss issues, new state regulations and their effect on claims settlement.

CE/CLE

The Local Chapter is responsible for all aspects of education. If CE/CLE is requested, the Local chapter must obtain the outline and PowerPoint (if one is to be used during the presentation) along with the substantive information handout (required) for CE/CLE approval. Education sessions should be limited to 1 – 2 hours for maximum attendance. Please note the form must be submitted 90 days in advance for CE/CLE submission.

Speakers

- For education events, speakers must be pre-selected, be active registered CLM members.
- Vendors and consultants may not participate on the discussion panel unless they are sponsoring the specific event.
- Each panel must include at least one (1) industry professional.
- Minimum of 2 with a maximum of four (4) speakers/panelists per presentation.
- No more than one speaker from the same firm/company may participate in the same panel/presentation or in an additional presentation given at the same event.
- Local Chapter Leadership should not be the only speakers at an event presentation.
- There is to be no sales pitching within the educational component.

Local Chapter Event Set-up Requirements

When the Local Chapter Event Form is complete and approved by CLM administration, the event will be listed on the CLM website.

Event Form and Submission Requirements for event approval:

- Submission of Event Form prior to 75 days of the educational event or 60 days for a networking only event.
- Be descriptive with your event narrative as this will be transposed to advertise the event on the CLM website.
- Provide all venue details
- Provide all details including presentation details, if applicable
- Provide details for all confirmed sponsors, who are registered CLM fellows or members, and name of attendees. Include additional fellow/member if not attending but will be responsible for payment of the invoice.
- An unexecuted contract for the venue (if applicable)

CLM Chapter Administration

Following CLM's approval of the completed Event Form and venue contract (if applicable), CLM Administration will:

- Create a link of the event on CLM's website for registration.
- Create and send CLM email invitations, consistent with CLM practices, to the local area CLM members.
- Create a poster and create a Social Media Asset for use on firm and personal Media Accounts.

Executing Chapter Events
Pre-Event Details

Promoting Your Event

CLM will send an initial email invitation 30 days prior and -10 days prior to an event. (2 emails)

Other ways to promote your event are:

- Use social media LinkedIn, Facebook, Instagram, Twitter, etc. #CLM
- Send emails personally inviting colleagues and clients to the event
- Ask the sponsors and speakers to invite colleagues and clients to the event

Approximately two to four days before an event, CLM Administration will provide the following information to the Chapter Leadership:

- Attendance List - This will be a state-approved format that must be used for sign-in and returned to CLM within 24 hours of the event taking place.
- Sponsor poster – This will have logos of all confirmed sponsors.
- CLM Check-In app instructions – This must be used to track attendance, verify CLM membership and registration for walk-ins.

Chapter Leadership should:
- Purchase Name tags and magic markers.
- Appoint one of the Chapter Leaders to send an email reminder to those scheduled to attend.
- Monitor walk-ins to verify CLM membership and register those people.
- Download CLM Check-in App.

Attendance count and breakdown can be accessed by clicking on the "Attendees" link from the event page on the website.

For the latest attendance list, download the "CLM Check-In" app which is available on the Apple and Google Play stores. See attached pages for Instructions.

Day of the Event
Chapter Leadership should arrive at the location at least one hour prior to the event.

If an attendee is not listed on the attendance roster, please ask for a business card to obtain all information. Have them sign in legibly on the attendance roster while the Chapter Leadership member verifies their CLM membership by clicking on the 'Registration' tab in the CLM check-in app and adding their name to the attendee list. If an unregistered attendee is a vendor, service provider or consultant that is not sponsoring the event, they should not be allowed into the event. You can refer non-members to the CLM Local Chapter Team for further assistance.

Post-Event Details
1. The Local Chapter will sync the check-in app and provide the signed attendance sheet to CLM Administration within 24-hours after the conclusion of the event.
2. CLM Administration will send Certificates of Completion to those in attendance and file for CE/CLE credits upon receipt of attendance sheets for all events with an education component.

3. Local Chapter Leadership will provide any information on the event to CLM Administration to detail how the event faired.
4. The Local Chapter is encouraged to take photos and forward them, along with a summary description of the event, to eric.gilkey@theclm.org and maureen.penn@theclm.org.

Forms and Templates

Local Chapter Event Planning Form, The Local Chapter Event Form needs to be completed and sent to CLM Administrative offices for every event.

Pre-Event Letter Template

The Pre-Event letter can be sent prior to the event to encourage registration. This letter can be reformatted as the will of the Local Chapter or used with the current verbiage. This sample can be found at the end of this document.

Post-Event Letter Templates

These letters can be modified by the Local Chapter or used with the current verbiage. This sample can be found at the end of this document.

Pre-Event Letter Template

Dear XXX

Please join us at the CLM's Greater Dallas Chapter 's Summer Solstice education and social event on Thursday June 20th at 4:30 in downtown Dallas at the Iron Cactus, 1520 Main Street.

The educational event (1 hour of CLE and CE credit(adjusters)) topic is " What the hail? Weather and Catastrophe Claims", presented by Rhonda Thompson, Esq. of Thompson, Coe Cousins & Irons, LP and Lynn Sheils, Esq., General Counsel of EW I Re, Inc.

Immediately following the presentation & discussion, will be a mixer featuring Mexican food and margaritas. Also, the Iron Cactus has live music that night. We look forward to seeing you there!

Please visit the CLM website to register.

Thanks for your interest and participation! We hope to see you there.

Post Event Letter (Attended)

Dear XXX,

The CLM event at Lawry's in Addison was a great success last night and we are glad that you were able to join us. We were very encouraged by the turn-out of over 60 attendees and the momentum of the Greater Dallas Chapter. We hope that you can join us this again this spring for one or all of the following events that are both educational (including CLE and CE units) and/or social in nature:

1. April 9-12 – CLM Annual Conference (San Antonio);

2. April 23 – Annual CLM/CPCU Charity Golf Tournament (Stonebridge, McKinney);

3. May 16 – Texas Event at Rangers Ballpark in Arlington.

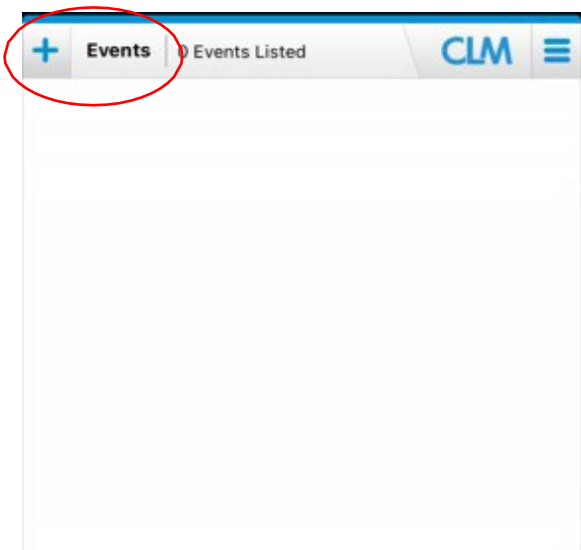Thanks for your interest and participation! We hope to see you soon.

CLM Event Check-In
Business

Use the same credentials you use to log into the CLM website. Make sure to wait until all characters in your password change to a dot **.**
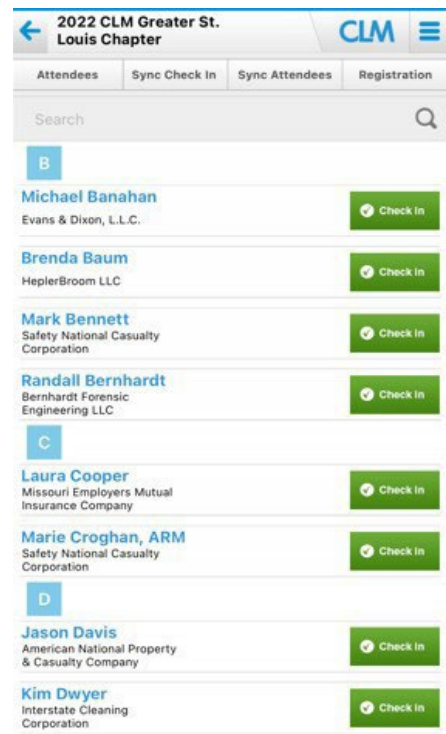

CLM
EVENT CHECK IN APP

esther.muram@theclm.org

Log in

Click on the + symbol to add the event
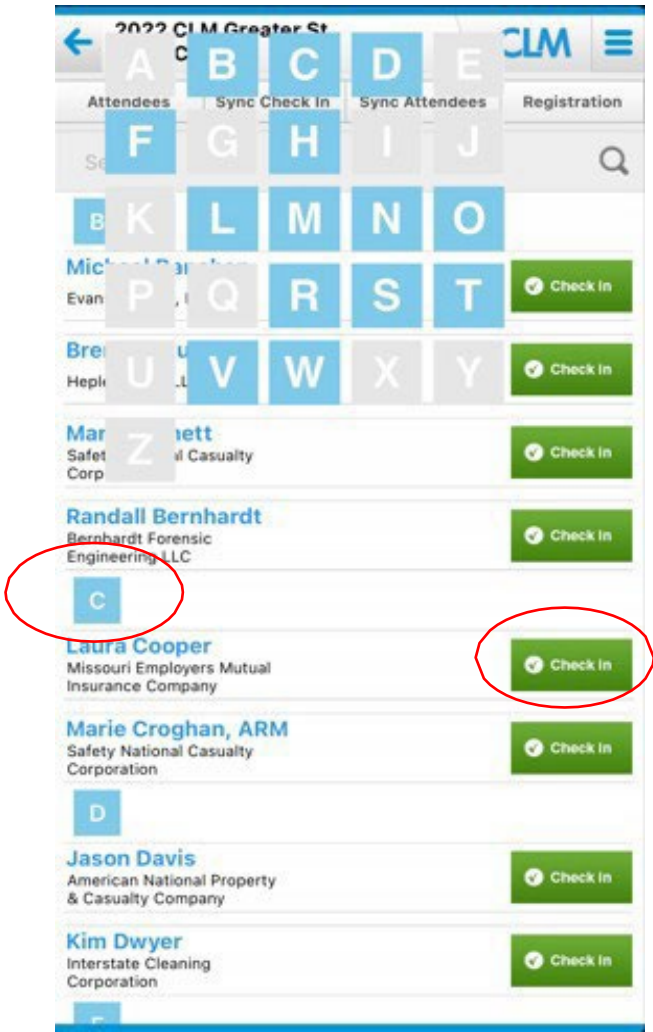

+ Events 0 Events Listed CLM ≡

You can select the event directly from the drop down menu or click the calendar symbol to select a date and click on **Add Events**
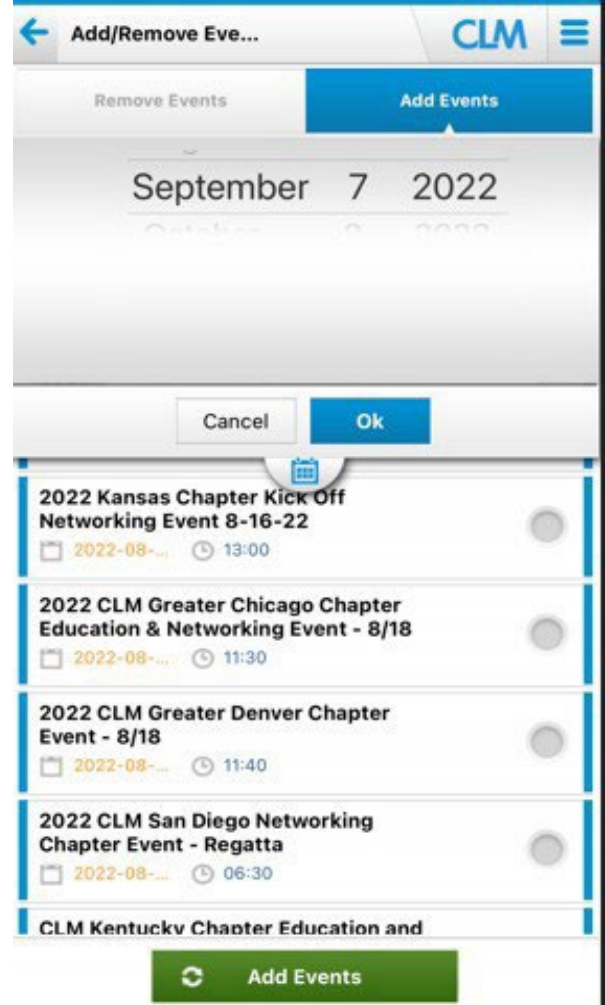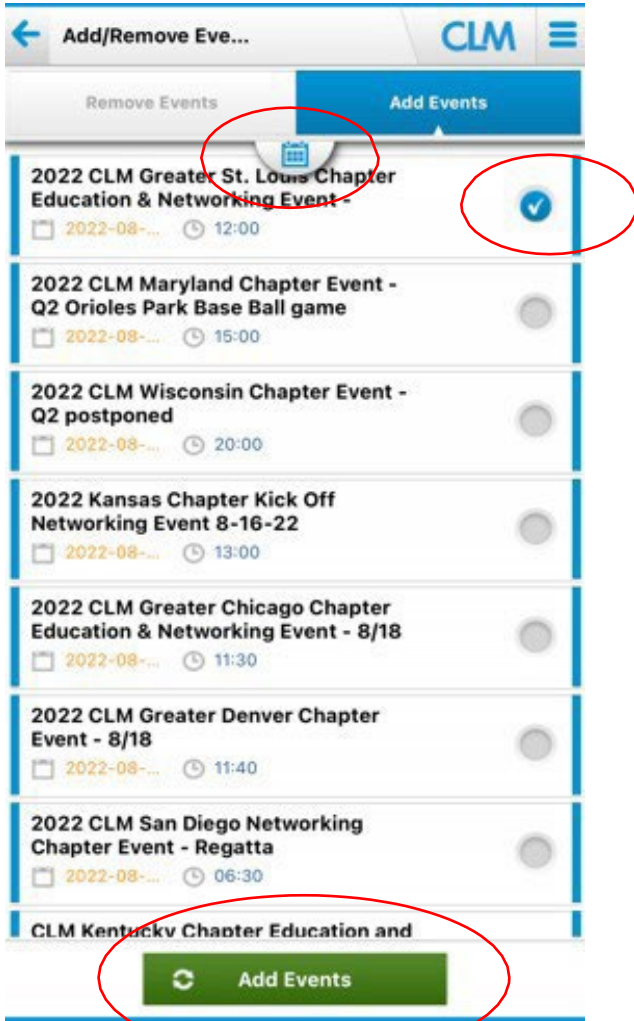
Click on the People symbol to view all attendees

To check-in attendees you can click on their names or click on the alphabet letters and then click Check In. The box will turn gray and will say Undo Check In.

Hover over **Sync** and click on **Sync Attendees** and the **Sync Check in.** You'll need to be connected to the internet for this step.