

# **SGMP Central Florida Chapter**

## **POLICIES AND PROCEDURES MANUAL**



**April 2006**

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# **SECTION 1**

# **COMMITTEES**

**Policies & Procedures**  
SGMP Central Florida Chapter

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| <b>Committee Organization</b>   | <b>Section 1: Committees</b><br><br><b>Policy No. 1A</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

Standing and Ad Hoc Committees are appointed by the Chapter Board as needed to carry out the work of the Chapter.

The Chapter Board appoints the Chairperson of each committee.

Committee participation is voluntary and open to all categories of membership.

Committee budgets are submitted to the Chapter Board, for approval, at the Annual Board Retreat or within 60-days of committee formation.

Active participation is expected of all committee members.

All committees must keep records for permanent retention.

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| <b>PROGRAM COMMITTEE</b>  | <b>Section: Committees</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: | <b>Policy No. 1B</b>       |

**Summary**

The program committee is dedicated to providing high quality educational sessions at the monthly chapter meetings. In addition, the committee is responsible for soliciting and securing monthly meeting sponsors and venues. Committee members survey the chapter membership for programming ideas, and then select monthly topics based on the input received from the membership. Each committee member is assigned the coordination duties of a monthly meeting. The coordination consists of assisting the sponsor with venue selection, obtaining a speaker on the assigned topic, and communicating with the speaker, venue, meeting sponsor, and chapter Board.

**Policy**

The Board will ensure that National policies and procedures are followed.

The committee meets monthly or bi-monthly, as needed, to assist members with coordination duties and to plan for the coming year.

Chapter meetings are held the third Thursday of the month, unless determined otherwise by the Chapter Board.

The meeting sponsor will select his/her preference of either a luncheon or evening event. RSVPs should be solicited for luncheon events. Historical attendance records are used to determine number of attendees for evening events.

The committee will solicit sponsors and determine monthly locations after the Board has determined the meeting dates. The committee is responsible for all planning aspects of the program, including speaker and arrangements, in accordance with the Program Committee Guidelines (see below). Committee duties include:

- Solicit sponsors
- Determine locations
- Select educational topics and Speakers
- Coordinate with sponsor, venue and speaker
- Communicate monthly meeting information to membership

- Evaluate meeting

A survey of the membership will be used to help determine educational topics.

## **Guidelines for Monthly Program Arrangements**

### ***Program Arrangements***

Each monthly program organizer begins by completing a blank program submission form and emailing it as a one-page document as directed on the form so everyone is in the loop. The form should be self-explanatory. Also, please encourage presenters to develop handouts (help them if necessary) so members walk away with educational materials for future reference. Ideally we should get electronic copies of their handouts so we can easily add them to the web site and newsletter.

### ***Speaker Arrangements***

#### **The program coordinator for each month is responsible for making sure:**

- The speaker knows the location, date and time of the meeting
- The speaker is provided with instructions for preparing/providing handouts and for having them copied and distributed
- The speaker has a hotel reservation if from out-of-town
- The speaker bio is obtained for introduction purposes unless you know them personally
- Obtain the speaker's AV requirements. If a PowerPoint presentation, arrange for a laptop and computer projector, screen, etc. Obtain file in advance
- Arrive early and confirm meeting set-up is accurate, AV equipment works and handouts are distributed on tables
- The speaker is welcomed, properly introduced and thanked

### ***Host Location/Sponsor Arrangements***

#### **The program coordinator for each month is responsible for making sure:**

- A meeting site is selected and reception arrangements are made
- The sponsor and meeting facility is informed of set-up details including speaker's AV needs and expected attendance (usually 45-55 people)
- The sponsor has finalized menu/catering arrangements (non-alcoholic beverages must always be served)
- The sponsor and host site know about payment instructions. (Be sure the host facility knows who the sponsor is and that the sponsor is responsible for payment.)
- A special guest room rate is obtained from host hotel or nearby property for out-of-town chapter members (get reservation instructions)
- Directions to the meeting site and special instructions are provided (include parking instructions when applicable)
- Obtain sponsor logos and web links for incorporation into the meeting notice
- Develop itinerary/outline for meeting; include time on the front end for welcome/business announcements & guest introductions (usually about 5 minutes), sponsor recognition (5-10 minutes) and speaker introductions (1 minute); For the

sponsor recognition segment, it works well when sponsors do trivia questions and give away prizes, but it is a lot of work in advance to develop and promote it.

- The meeting itinerary/agenda is given to Chapter President
- Program evaluation forms are distributed, completed and collected at each meeting
- Include description of monthly charity (obtain info from Community Service Committee Chair)
- See that any other items are distributed as requested (flyers, brochures, etc.) something comes up every month
- The Sponsor(s) is(are) welcomed, properly introduced and thanked

### ***Publicity Arrangements***

If you are not sure how to write a meeting description, refer to the sample Program Submission Form from January 2002. You can also refer to previous meeting announcements sent out for February, March and April of this year. I have copies on file if you deleted yours.

### **Items that need to be included in the publicity flyer are:**

- Date, location and time of meeting
- Meeting description (2-3 sentences) of what folks will learn/benefits of attending
- Presenter name(s) and affiliation/credentials
- Sponsor logos and web links
- Information on the monthly charity (information provided by Community Service Chair)
- When possible, guest room rate specials from host hotel or nearby property for out-of-town chapter members (include reservation instructions)

Directions to the meeting site and special instructions as provided (i.e., parking, web links, etc.)

### ***Meeting Follow-up***

#### **The program coordinator for each month is responsible for making sure:**

- Thank you notes are sent to the speaker and all sponsors
- Evaluation forms are delivered to the president within five working days
- Ensure honorariums and travel reimbursements are within the annual budget, track these expenses and submit reimbursement requests to the Board.

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| <b>MEMERSHIP COMMITTEE</b>  | <b>Section: Committees</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: | <b>Policy No. 1C</b>       |

**Summary**

The membership committee is responsible for processing membership applications and dues payments in accordance with national membership categories and general policy. This committee also monitors the planner/supplier ratio, membership drops and retention and assists new members in joining a committee.

**Policy**

**Membership Categories:**

**Government Planner:** Federal, state or local government employees who have the responsibility for the planning and the implementation of any type of meeting, conference or convention as part of their official duties. Employees of private organizations, a majority of whose membership is comprised of government employees may also qualify as government planners if they plan and implement meetings as part of their official duties.

**Contract Planner:** Individuals, organizations or companies operating under contract to government agencies, and are receiving said payments directly from government agencies, to assist in the planning or implementation of meetings, conferences or conventions are contract planners by this definition.

**Associate Supplier:** Individuals, organizations or companies that are compensated through retainer or commission from suppliers (i.e., hotels, conference centers, cities, etc.) will be considered associate suppliers. This means that individuals, organizations or companies whose income in the planning or placement of government meetings, conferences or conventions is derived from suppliers are also considered suppliers.

**Supplier:** Companies or individuals who solicit business from and/or who provide facilities and services to government planners outside of direct assistance in the planning and implementation of meetings. Suppliers include hotel representation firms, travel agents, convention bureaus, consulting firms, registration services, airlines, printers, exhibit managers, security services, etc.



**Education/Retired/Student:** Educators, students and retirees who would not otherwise qualify for any other membership category (e.g., a retired government planner who works under contract for planners and suppliers would have to join as a contract planner or supplier). This is a non-voting category and does not count towards the matching requirement.

## **Membership Dues**

Membership dues as specified by National guidelines according to their membership categories. An individual that qualifies in more than one SGMP membership category is required to apply for membership in the category with the highest membership fee.

Members of SGMP are welcome to attend meetings of any of the Chapters. However, only Chapter affiliated members may participate in voting matters.

A member can attend up to three meetings a year of another Chapter. After the third meeting, she/he must become a member of that Chapter to continue to attend meetings.

Potential new members may attend up to three meetings within a year before joining the chapter. The first meeting may be as a guest at no charge, with the second and third meetings at the regular monthly fee. After the third meeting, they must become a member of the chapter to continue attending monthly meeting or events.

## **Policy Membership Processing**

The Membership Chairperson receives the application form and payment and forwards the original membership application form and payment to the National Headquarters office. Copies and faxes of the application are not acceptable. Since the individual is a member of the national organization, the original paperwork must be on file at the National Headquarters.

All applications and monies to be processed for the month are to be received at the National SGMP office by the last working day of each month.

The application must be legible. It is recommended that it be typed or printed.

The application must have SGMP Central Florida Chapter on it or it may go into the members at large category.

A new member form cover sheet must be completed and accompany all applications.

All new planner members must complete a meeting planner profile sheet, which is included as part of the application and renewal. Applications and renewals will not be processed without the profile sheet being completed.

The application for membership is to be approved by the National Office. Membership is not official until done so. The anniversary month of the membership will be the month it is approved by the National Board. Membership runs for one year from that date of approval. Example: the local membership chair receives application in May, but membership not approved by National until July, so the anniversary will be July.

Any membership applications mailed directly to National Headquarters will be forwarded to the chapter membership chair without processing. If the prospective member fails to designate chapter affiliation, SGMP's membership office will call the applicant and encourage the local chapter affiliation.

### **Membership Chair responsibility for new members**

Each new member is to receive the following after their application is processed:

- Welcome letter
- Membership directory
- Committee sign up sheet
- Calendar of events
- Current newsletter

All new members are assigned to a mentor. The Chair will email the assigned mentor upon receipt of the new member application. Initially, the board members will be the mentors and all new members will be assigned so each board member has approximately the same number of new members. It is expected the mentor list will expand once the program is fully under way.

### **Transferring Membership**

A transfer form must be completed and signed by the member. The chairperson needs to forward updates to necessary Board members.

Membership applications and transfer forms may be found on line at [www.sgmp.org](http://www.sgmp.org).

### **Membership Renewals**

Members are given 30 days after the anniversary date to pay their membership dues. They receive 3 notices and a drop letter from SGMP National Headquarters. Membership drops will be listed on the monthly membership report.

All planners must complete a planner profile with each year's renewal.

The Membership chair and/or a committee member will encourage each member up for renewal to watch for their paperwork from the National Office.

The chapter may not pay or subsidize the planner renewal fees.

### **Chapter/Supplier payment for dues**

Chapters are not allowed to pay dues for members. If a chapter holds an event where the membership is included in the registration fee for the event and a check for dues is written by the chapter, this must be indicated on the chapter check, by providing the members name at the bottom of the check or including a cover letter indicating which membership the check covers.

SGMP will not accept nor condone payment from supplier members for potential government meeting planners

### **Membership Drops**

A member, who allows their membership to lapse, will be dropped and if they wish to rejoin must submit a new membership application.

Suppliers who drop their membership must be matched with a new meeting planner match to rejoin.

Any planner member, whose membership lapsed and rejoins the same chapter less than a year after her/his former anniversary month, cannot be matched with a new supplier application.

A meeting planner whose membership drops must submit a new application to rejoin. She/he will receive a new anniversary date based on National Board approval of membership.

### **Ratio**

The chapter must maintain a 50/50 ratio of planners and suppliers. If the chapter falls below the 50/50 ratio and remains there for 3 months it will not be able to accept supplier membership until the ratio returns to 50/50 for three consecutive months.

To guard against this situation, the Chapter Board has voted to keep the membership ratio well above this limit if possible. Aiming to keep the ratio above 54/46 (planners to suppliers) also points the chapter toward achieving the 60/40 ratio National has suggested chapters attain.

### **Retention**

The chapter Retention Representative works with the national Membership Retention Chairperson to decrease the chapter membership drop rate. Among other tasks as

dictated by National, the Retention Representative receives the 90-day Drop Report from National and contacts these members to determine interest in continued membership. The Membership Chair and President are notified of intent to renew. The President and Membership Chair receive the Drop List from National and the President calls the members who indicated continued interest.

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| <b>Honors and Awards Committee</b>                                      | <b>Section: Committees</b><br><br><b>Policy No. 1D</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

## **AWARDS & HONORS**

### **Summary**

This section summarizes the various awards and honors given to chapter members. This committee is inactive at the time of this writing.

### **Policy**

**The Planner & Supplier of the Year** awards are selected by the entire membership – nominations are collected from the membership and the voting is done by the membership.

A letter is sent to the membership asking for nominees for each of the awards. After the nominations are complete a ballot, (using a numbering system for verification) is compiled and sent to the general membership for voting purposes.

The committee tallies the votes (any nominees on the committee will not participate in the counting) and the awards are presented at the June meeting.

### **PRESIDENT’S AWARD**

This is an optional award that can be selected and presented by the president if he/she so wishes.

### **APPRECIATION AWARDS**

These are certificates of appreciation given to various suppliers and planners (members and non-members) who donate items to various functions throughout the year, i.e. Silent Auction, Education Day, Charity Raffles, monthly meetings, door prizes, sponsorships, etc. Period covered for the accumulation of points would be June 1 thru May 31 of each year. The guidelines for the various levels are:

- \$1 - \$1000 - Bronze Level – certificate of appreciation
- \$1001 - \$2500 – Silver Level – certificate of appreciation in a nice silver frame
- \$2501 - \$5000 – Gold Level – certificate of appreciation in a nice gold frame
- \$5000 and up – Diamond or Platinum Level – Diamond acrylic self standing plaque

There have been times when we have lowered the levels in order to have a Diamond winner.

### **ATTENDANCE AWARDS**

These awards are given to the member(s) who attend every function. The Board tallies the attendance of members at all functions including the monthly educational meetings, the annual tradeshow, the charity event, and the Holiday/Supplier Appreciation Party from June 1 through May 31. The amount of the award will be determined by the Board and presented at the June meeting. Board members are exempt. In order to qualify, attendees must sign in at all functions at the registration desk. The Treasurer will keep the attendance records.

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| <b>COMMUNICATIONS COMMITTEE PROCEDURES</b>                              | <b>Section: Committees</b><br><br><b>Policy No. 1E</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

**Summary**

The Communications Committee is responsible for communicating chapter news to the membership, potential members and the public.

**Policy**

The Communications Committee will be responsible for publication of the Chapter's newsletter, which is published bi-monthly, and the Chapter's website. This committee is also responsible for providing information on the Chapter activities to the Society's national newsletter.

Each edition of the newsletter and website will contain the following information:

- Chapter calendar of events
- Committee reports
- Review of past programs/events
- Articles for upcoming programs/events
- List of board members with contact information
- Name of the chapters newsletter
- Name of the chapter SGMP Central Florida Chapter
- Date and volume or issue number must appear on the cover
- Any other pertinent information that the Board deems appropriate

**Newsletter Timeline**

The current newsletter is distributed by e-mail format. For those unable to receive by electronic distribution, a paper copy will be mailed or faxed upon request. The newsletter will also be made available on the chapter website.

It is the responsibility of the Communications Committee chair to set deadlines for articles to be submitted to the newsletter and to compile submitted articles into the next edition of the newsletter. Normal deadline for submitting articles would be one to two weeks after the last bi-monthly meeting for a publication date the following week. Newsletters must be printed, published and distributed within 30 days of the ending date of the issue period. (i.e., newsletter is bi-monthly covering January and February, the distribution date must be by the end of March). Website updates will be made as

needed. The Board will establish advertising guidelines and cost publication. Any change or addition to the newsletter or website must be reviewed and approved by the president or another designated board member in the absence of the president before posting.



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| <b>ELECTION &amp; NOMINATIONS<br/>COMMITTEE PROCEDURES</b>              | <b>Section: Committees</b><br><br><b>Policy No. 1F</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

**Summary**

The Nominations and Elections committee is responsible for ensuring elections are held in accordance with chapter national bylaws. Elections for this chapter are held biannually.

**Policy**  
**Committee Chairperson**

The committee chair is the Immediate Past President. Should this person be unavailable, the president will appoint a chair.  
Eligibility for Nomination

Candidates must:

- Qualify for the office category they are seeking
- Be a member in good standing, which includes, but is not limited to, having dues paid for the current year

**Nominations Procedures**

In an election year, the Elections and Nominations Committee chair or designee will announce at a monthly membership meeting the deadline for submission of nominations for office; this will usually occur at the February meeting. The chapter will vote before the March meeting and the new officers will be announced at the April meeting. [Members may nominate themselves as candidates for office. Members may also nominate other members as candidates for office, provided they have that person's prior permission. Candidates must be a member in SGMP for at least one (1) year from the time of nomination

The committee will verify all nominees are members in good standing and there is a proper ratio of planners and suppliers, with a maximum of four (4) suppliers, according to the National SGMP Bylaws.

The committee will prepare a ballot form and an official letter accompanying the ballot with a list of the candidates and information about each person. The ballots will be

numbered for verification. The ballots will be distributed according to the National bylaws; at this time, they must be mailed.

The committee chair will announce the slate of officers at the April membership meeting.

A ballot package (ballot, list of candidates for each office, bio and picture for each candidate) will be mailed or emailed to all members in good standing in sufficient time to allow 30 days for voting deadline. Ballots will be numbered to assist with verification.

### **Voting Procedures**

Members mail or email ballots; they cannot be faxed.

All ballots are counted by a specified committee member (if possible, the chair), verified on the closing date by the entire committee and noted on an official master ballot.

The committee chair or designee will immediately notify the chapter president of the results of the election.

The committee chair or designee will announce the results of the election at the April meeting.

The new Board will be installed at the June membership meeting.

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| <b>SPECIAL EVENTS COMMITTEE</b>   | <b>Section: Committees</b> |
|   | <b>Policy No. 1G</b>       |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |                            |

**Summary**

The chapter adopted the Supplier Appreciation theme of one meeting as a way to thank our suppliers each year. Currently, the party takes place during the holiday season. Proceeds raised from the silent auction are used as a funding resource for scholarships to be used by planners and suppliers in attending the SGMP National Conference and Regional Conferences.

**Policy for the Supplier Appreciation Meeting**

The co-chairs will determine with the Board the date and location and ensure it is announced during a membership meeting. The committee will work closely with the representative of the chosen site on layout of the room and guaranteeing the number of attendees. The committee will purchase awards and present them to supplier members.

**Policy for the Silent Auction**

Proceeds raised from the silent auction are used as a funding resource for scholarships to be used by planners and suppliers in attending the SGMP National Conference and Regional Conferences.

The committee will submit a newsletter article announcing the details for the Silent Auction and the Holiday/Supplier Appreciation Party to the communication committee in time to advertise the auction. The committee will also disseminate Silent Auction donation forms, review the list of donations and follow-up to ensure donations are received. This group is also responsible for finalizing the details and transportation of donated items and processing check payments.

The committee will ensure the following items are at the site for the auction:

- copies of the list of donated items
- bid sheets, blank bid sheets and pens to place by each bid sheet
- calculator, laptop computer, notepad, pens, stapler, extension cord and power strip
- receipt book and moneybag

A thank you letter will be mailed to each sponsor and donor and a newsletter article will be prepared providing pertinent details.

# Policies and Procedures Manual

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| <b>SCHOLARSHIP COMMITTEE</b>  | <b>Section: Committees</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: | <b>Policy No. 1H</b>       |

## Summary

In an effort to send as many members as possible to the national regional and state conferences, the board grants scholarships to planners and suppliers whose employers will not support their travel.

## Policy

Scholarship funds are allocated to planner and supplier members to attend the Society of Government Meeting Professionals' National Education Conference and Regional Conferences. Scholarships are awarded based on volunteer hours and membership standing. Applicants can apply for partial or full scholarships. All members are encouraged to apply for a scholarship. The scholarship eligibility time frame is December or January and allows time to notify and announce the recipients, and make travel prior to the annual conference.

The committee chairperson has the authority to revise the scholarship application form at any time, with Board approval.

The committee chairperson is responsible for estimating the cost of all travel (including flights, hotel reservations and conference registration for all scholarship recipients) is calculated prior to board consideration of awards. Mileage is reimbursable at the current government rate, not to exceed the cost of airline tickets negotiated by the board liaison for that conference. If any travel arrangements are made outside of this procedure, the chapter will not reimburse and it will be the responsibility of the individual to pay in full.

The Board will determine the budgeted amount to be used for scholarships for the upcoming annual conference.

The committee chair will distribute applications to the entire Central Florida membership via email and announce scholarship recipients at a monthly membership meeting as well as send to the membership via email.

After the conference, each recipient shall submit a newsletter article on one of the conference educational sessions no later than 30 days after the conference. The

recipient shall submit a form signed by his/her supervisor, indicating the supervisor's understanding of the scholarship.

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| <b>COMMUNITY SERVICE<br/>COMMITTEE</b>                                  | <b>Section: Committees</b><br><br><b>Policy 11</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

**Summary**

In an effort to give back to communities nationwide, this committee coordinates donations to local organizations,

**Policy**

The committee gathers ideas for charities of choice from general membership, compiles the list and chooses the charities for each month. After the charities are chosen, the committee will determine what type of event(s) will be held to raise funds.

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| <b>BYLAWS AND POLICY &amp; PROCEDURES COMMITTEE</b>                     | <b>Section: Committees</b><br><br><b>Policy No. 1K</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |  |

**Summary**

National SGMP bylaws stipulating changes to the national bylaws shall be incorporated into the chapter bylaws, Article VII, Section 3.

**Policy**

The Board will review and maintain, as needed, the by-laws and policies and procedures in accordance with National guidelines. The president will ensure the chapter bylaws conform to the National bylaws

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| <b>FUNDRAISING<br/>COMMITTEE</b>                            | <b>Section: Committees<br/>Policy No. 1K</b> |
| <b>Date: Draft February 2006</b><br>Revised:<br>Reaffirmed: |  |

**Summary**

The fundraising committee conducts activities that generate funds for member scholarships to educational meetings and conferences, both instate and nationwide. This group is also responsible for coordinating with other committees to ensure a wide and non-redundant distribution of solicitations and donations. This ensures that donations are used to provide maximum value to the organization.

**Policy**

The committee seeks suggestions from the general membership on activities to pursue. A list of activities is made based on membership interest, ease of execution, and maximum returns. Both short term and a long term plans with expected results are presented to the board each year as part of the chapter-wide budget and goal setting activities. The committee executes the plans and submits a report to the board following each fund raising activity or as necessary. General reports to the membership are made as requested by the board The committee sends thank you notes to all donors.

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# **SECTION 2 GENERAL**

**POLICY & PROCEDURES MANUAL**  
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| <b>RECORDS RETENTION</b>  | <b>Section: General</b><br><br><b>Policy 2A</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |   |

**Summary**

This policy covers the responsibility of our chapter's record retention. This process and schedule covers records kept by the national organization, committees and chapters.

**Policy**

The Board will ensure that National policies and procedures are followed.

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| <b>FINANCES</b>   | <b>Section: General</b><br><br><b>Policy No. 2B</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |   |

**Summary**

The chapter treasurer will ensure all financial reports required by National are submitted on time.

**POLICY**

All disbursements must be approved by the Chapter Board. Committee budgets are submitted annually.

The treasurer and the president will lead the chapter board in the development of the annual budget. This budget shall be approved as soon as possible after the beginning of the fiscal year.

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| <b>Membership labels (sale of)</b>                                      | <b>Section: General</b><br><br><b>Policy No. 2C</b> |
| <b>Date: Draft February 2005</b><br>Revised: August 2005<br>Reaffirmed: |   |

**Summary**

This section covers the cost at which membership labels will be sold.

**Policy**

Membership labels will be sold at a cost determined by the SGMP Central Florida Chapter Board or referred to SGMP National Headquarters staff.