



**NEW CHAPTER FORMATION
GUIDE** As of September 1, 2014

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INTRODUCTION

The purpose and mission of Lambda Alpha International (LAI) is to advance the study and practice of land economics—the practice of designing, developing, valuing, and husbanding the use and maintenance of real property as a social good. As an honorary organization established to recognize and facilitate interaction among the leaders in all professions contributing to land economics, LAI strives to encourage shared knowledge among its members and to encourage them to create, support, and participate in educational and training activities aimed at promulgating sound land economic practices. LAI seeks to foster highly ethical practices and encourage learning and exchange among its members through meetings, discussions, social interaction, and community activities organized at a local Chapter level and through international meetings and events.

LAI exists as a vehicle to aid in developing and sharing the principles and practices of land economics among its members. It provides a forum for the transfer and debate of land economic principles, concepts, and projects among the variety of professions that constitute the practice of land economics, such as architects, city planners, developers, appraisers, attorneys, real estate professionals, and government officials. Its meetings, events, and publications provide a platform to facilitate such discussions, encourage learning and personal contact, and honor the significant contributions of relevant professionals.

LAI allows members to gain personal satisfaction from being a member of an elect community of their peers. Through the social and educational components of membership, members have ample opportunity to stimulate their intellectual curiosity and give back to the community in the form of better professional decisions and communitywide educational and service opportunities.

The interactions between knowledgeable colleagues, presentations, workshops, and discussion forms provided at the local Chapter and international level provide continuing insights for each member as to how to make better land use and real estate decisions.

LAI allows members to establish a broad and deep social and professional peer network of colleagues in their city of residence, as well as in all communities that host a LAI Chapter.



WHY SHOULD YOUR GROUP FORM AN LAI CHAPTER?

The question most often asked when considering the establishment of a chartered LAI Chapter is, "What are the benefits of being a Chapter?"

These are some of the most significant benefits:

- **Strength in Numbers:** A new Chapter will be the local arm of a dynamic global organization. It will be linked in purpose and in practice with 20+ other Chapters, representing more than 2,000 members around the world.
- **Professional Support:** LAI members are successful workplace professionals. Networking with individuals on the local, national, and international levels promotes new ideas, advanced practices, and creative solutions to common problems.
- **Professional Advancement:** LAI members receive a steady stream of printed and electronic information. Members have access to two annual opportunities to attend Land Economics Weekends, offering a wealth of practical knowledge and insight about the host communities. A Chapter serves as a conduit for this information and as a catalyst for education and networking opportunities on the local level.
- **Personal Advancement with LAI:** LAI is led by volunteers who are full-time workplace professionals and who have held positions of progressive responsibility in LAI beginning with service to their Chapter. LAI has many elected and appointed positions available to individuals wishing to develop their professional, advisory, and management skills and make a contribution to their profession.

LAI provides a great variety of products and services to its members, but friendly, convenient, and well-run local Chapters are the "front line" of the association. Chapters are the venue in which most day-to-day activity occurs, where most newcomers get their first impression of LAI, and where the benefits of membership are most closely experienced.



NEW CHAPTER FORMATION PROCEDURES

This manual presents a series of steps for the formation of a Chapter of LAI. With a few important exceptions, these steps should be considered guidelines that may be adapted in form and timing to meet your particular needs.

A Chapter of LAI is an independent, corporate structure and functioning unit of the organization, with privileges and responsibilities that are determined by the LAI Board of Governors. A group may represent itself as a Chapter of LAI only after it has the express approval of the Board of Governors in the form of a Chapter Charter (in accordance with LAI By-Laws).

The primary role of a Chapter is to provide educational and networking opportunities for its members and for the land economics community that it serves. A Chapter serves as a conduit for information about LAI, its programs, services, and foundation, as well as for the trends, techniques, and technologies that affect the profession.

A Chapter is an extension of the organization. Therefore, its leaders should be aware of, and act in accordance with, the mission of the organization. Approval and acknowledgment by LAI is a prerequisite for membership formulation of a Chapter.

Chapter Presidents are full voting members of the LAI Board of Governors.

As an affiliate of a not-for-profit professional association, a Chapter is also a legal entity. In the United States, the U.S. Internal Revenue Service classifies it as a 501(c)(6) association. Its activities must adhere to the requirements of this classification, or those of a similar regulatory agency in the county in which it is located. Chapters on formation are to be incorporated.

LAI is committed to supporting the successful establishment of new Chapters through tools, such as this manual. LAI's New Chapter Development Committee (NCDC) is responsible for assisting the formation process for new Chapters. The Regional Vice President (RVP) for your area and the staff at LAI Headquarters are at your disposal for materials and advice. Once your Chapter is chartered, you will receive a more extensive Chapter Manual. This support will continue through dissemination of additional materials, leadership training, and other logistical support.



REQUIREMENTS FOR OBTAINING A CHAPTER CHARTER

Prospective Chapters must have the following items in place before the LAI Board of Governors will consider granting a Charter:

- At least 10 At-Large Members approved for membership by the LAI Board of Governors.
- A Chapter Affiliation Agreement approved by LAI for the prospective Chapter.
- An elected slate of officers who agree to fulfill the responsibilities of their positions for a minimum of 1 year.
- Chapter By-Laws that mirror International's constitution and By-Law principals and protocols.
- A commitment that prospective Chapters will build to a target of 100 members who are active members of LAI and who agree to participate in Chapter activities.

For all prospective new Chapters of LAI, the new Chapter leader or another designee must inquire with the appropriate government department, agency, or ministry for recognition of a proposed Chapter name and approval for a local Chapter of a foreign not-for-profit association to operate legally within the jurisdiction. The costs in time and money for the registration process vary widely from country to country, so these inquiries should be made early in the formation process, and LAI Headquarters should be consulted regularly on your progress.

LAI provides modest reimbursement of \$5,000 for eligible start-up costs actually incurred. See Exhibit 1 for authorized expenditures. All expenditures must be approved by the Chair of the New Chapter Development Committee and the Regional Vice President who is responsible for the geographic area where the new chapter will be located.

By extension, all Chapters which operate under a charter granted by LAI agree to abide by the same rules and regulations and acknowledge that LAI will enforce them vigorously and fairly in all matters.

The staff at LAI Headquarters is a source of advice, information, and support in the effort to establish a Chapter.

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Phoenix, AZ 85050
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Fax: 602.532.7865
E-mail: lai@lai.org
Web site: www.lai.org



POLICY ON THE USE OF LAI'S NAME AND LOGO

LAI and its trademarked logo have become recognized and respected in the marketplace. It is important that the use of the LAI name and logo be strictly limited to programs authorized by LAI and its chartered Chapters.



SUMMARY OF NEW CHAPTER FORMATION PROCEDURES

The Chapter formation process generally includes six steps, which are first outlined and then discussed in detail below.

Early steps may spontaneously occur even before a group of Chapter organizers have received this manual. Suggested forms are included in the Exhibits to assist in the formation process. The actions identified in Step 3 are required before LAI will act on a Chapter Charter request.

- Step 1:** Establish a Chapter Formation Steering Committee
- Step 2:** Hold a Chapter Recruitment Meeting
- Step 3:** Hold a Chapter Organizational Meeting
- Step 4:** Complete LAI Formal Approval Actions for New Chapter
- Step 5:** Hold a Chapter Inaugural Meeting
- Step 6:** Complete Chapter Formation Actions

Step 1: Establish a Chapter Formation Steering Committee

Identify local Chapter formation leader
 Identify LAI Chapter formation leader
 Submit letter of interest to LAI Executive Director
 Coordinate formation process with assigned LAI RVP

Review the following LAI documents, supplied by LAI:

- LAI Information Pamphlet
- LAI General By-Laws (Chapter charter provisions in Article VI)
- Draft Standard Chapter By-Laws
- LAI Strategic Plan
- Procedures to Form a Chapter of LAI
- LAI Chapter Operations Manual.

These documents are available from LAI Headquarters or on the LAI Web site

Step 2: Hold A Chapter Recruitment Meeting

Outline Chapter activities and purposes
 Establish timing, frequency, and location of meetings
 Discuss membership benefits
 Identify candidates for membership
 Identify program topics
 Discuss Chapter structure and operations



Identification and commitment for at least 10 At-Large Members is required before submitting documents for formal approval described in Step 3.

RVP or other LAI representative should attend

Step 3: Hold A Chapter Organizational Meeting

Prerequisite: Acceptance of at least 10 prospective members

Note: These actions do not need to proceed simultaneously

Elect pro-tempore officers

Approve and sign Affiliation Agreement

Submit letter of petition for Chapter charter, including these:

- Name of Chapter
- Territorial jurisdiction
- Affiliation Agreement
- Proposed Chapter By-Laws
- At least 10 applications for At-Large Membership to LAI

RVP or other LAI representative should attend

Materials should be forwarded to the LAI Executive Director at least 3 months before the next scheduled LAI Board of Governor's Meeting

Step 4: Complete LAI Formal Approval Actions for New Chapter

RVP Submits Endorsement Report to LAI Executive Committee

LAI Executive Committee and Board of Governor's Approval Actions:

1. LAI Executive Committee recommendation of At-Large Members to LAI Board of Governors.
2. Approve Affiliation Agreement.
3. Authorize funding for new Chapter formation costs.
4. Confirm At-Large Membership by LAI Board of Governors.
5. Receive Chapter Charter request.
6. LAI Executive Committee recommendation to LAI Board of Governors for Chapter Charter.
7. LAI Board of Governors grant new Chapter charter.

Charter Chapter Presentation—President of New Chapter should attend



Step 5: Hold a Chapter Inaugural Meeting

Initiate Chapter members

Approve Chapter incorporation documents (This may occur after Inaugural Meetings)

Elect officers

Adopt Chapter By-Laws

RVP or other LAI representative should attend

Step 6: Complete New Chapter Administrative Actions

Complete any outstanding Chapter incorporation procedures.

Set up Chapter administrative procedures.

Set up banking arrangement.



STEP 1: FORM A CHAPTER FORMATION STEERING COMMITTEE

At the outset of the new Chapter Formation Process, it is critical to identify at least two leaders. One leader needs to be the local contact who is the driving force behind the creation of the new Chapter. The other leader needs to be an active LAI member who will assist the local leader through his/her knowledge of the benefits and functions of LAI and his/her contacts with LAI leadership. The LAI leader typically is a Regional Vice President (RVP), a member of the LAI Board of Governors (which includes all current Chapter Presidents) or a LAI member who strongly supports the new Chapter.

The leader of the new Chapter should then contact International's Executive Director expressing interest in forming a new Chapter. The Executive Director will then notify the Executive Committee, the New Chapter Development Committee (NCDC) and the RVP of the interest in the formation of a new Chapter.

The local leader should then form a local Steering Committee. This Steering Committee is comprised of a core group interested in seeing the Chapter Formation Process through to a successful conclusion. LAI Headquarters, the designated RVP, and the NCDC will be sources of advice and support and should regularly be kept advised of progress and problems. However, the ultimate success will hinge largely on the efforts of the local leader and fellow committee members.

The members of the Steering Committee should be familiar with the mission of LAI and the ethics and rules governing the organization. The Steering Committee should be composed of enough individuals to serve as acting president and committee chairs responsible for key areas like membership, programs, finance and communications.

Members of the Steering Committee, and any subsequent committees, should be selected for their interest in the forming an LAI Chapter, familiarity with the local professional community, and their commitment to work collegially. Forming a Chapter can take anywhere from a few months to a couple of years, so the Steering Committee members need to understand the commitment.

The local leader should be an ex-officio member of all working committees. The leader should clearly convey his or her expectations to committee members, and define their responsibilities.

The Steering Committee will use the LAI's Standard Chapter By-Laws as a guide. These reflect the Constitution and By-Laws of LAI. Draft Chapter by-laws must be submitted to LAI Headquarters for review and approval. Any variations must be mostly local distinctions in nature. The LAI Board of Governors approve the By-Laws and amendments for each chartered Chapter, generally after completion of the Charter and incorporation process.

The Steering Committee should work closely with the RVP in assessing the feasibility of forming the Chapter and in identifying potential members. The RVP will coordinate support from the Executive Director, NCDC, and other Chapters.

The Steering Committee should assess whether there is sufficient support for an LAI Chapter. There must be an adequate pool of Land Economics professionals to sustain an active Chapter. There must also be evidence of individuals who are both able and willing to provide management and leadership



both in the start-up phase and in ongoing Chapter operations. Other important steps include the following.

- A. **Establish Proposed Chapter Boundaries:** Distance and ease of travel to meetings and other functions must be considered, as should proximity to other Chapters. The circumstances affecting this decision vary widely as demonstrated by these scenarios:

Members within a **large metropolitan area** already served by an LAI Chapter may determine that the Chapter is too large or inaccessible to meet their needs and may decide to establish or “spin off” a separate entity. The existing Chapter, as well as International, should be consulted before any formal action is taken. The final disposition will depend upon the consensus of the affected members.

Note: The Chapter name and its territorial limits are subject to LAI approval.

Members with a **country, state, province, or region** not served by a Chapter may consider the entire area for their Chapter. Again, distance and convenience of regular attendance are a governing consideration, as is the ability of other centers of economic activity to sustain an independent Chapter.

Note: Those responsible for getting approval for the Chapter from their governments (if needed) should take care that the Chapter name and registration is not completed in such a way that restricts the establishment of future Chapters in the country, state or region.

- B. **Determine Potential Membership:** A list of the current LAI members in your area, if any, can be obtained from LAI Headquarters. These individuals have already made some commitment to LAI and are an obvious choice to form the core of the Chapter. Recommendations from members in other Chapters are an excellent source for potential candidates. The Executive Director can solicit prospective candidates from all of the other LAI Chapters. Other potential sources of leads include: former members who have allowed their membership to expire, candidates who have inquired about membership, or otherwise interacted with the Organization, but have not yet joined.
- C. **Identify Potential Leaders:** Chapter officers typically serve terms of one or two years in any one position. Succession planning is important. An effective president will have served at several levels within the Chapter so that he or she knows what is expected of each position. For this reason, the ideal leadership candidate should be willing to commit several years of volunteer time in order to “learn the ropes.”
- D. **Determine the Chapter Name and Incorporation Requirements:**

Note: A local Chapter must be incorporated after it has been Chartered. The Corporation can not be officially formed or created before Chartering, as the LAI Board can not have its name used in a formal incorporated entity before the LAI Board has sanctioned a Chapter in the locality, with a name and territorial area it approves.

The name of the local Chapter must be cleared and approved by both LAI and the incorporating local jurisdiction (state, province or country), the latter through a formal 'Name Search and



Reservation', prior to the Charter being considered and issued by LAI, and prior to the Chapter formally applying for corporate status.

The process of determining support for a Chapter, and identifying leaders and members, often occurs through networking and one-to-one discussions. A survey instrument for determining the interest of potential LAI members is provided in **Exhibit 3**.

STEP 2: HOLD A CHAPTER RECRUITMENT MEETING

After the Steering Committee has determined there is likely to be enough interest to form a LAI Chapter and has identified a candidate list, a recruitment meeting should be held to solicit interest from potential members. At the recruitment meeting, the following items should be presented:

- Benefits of becoming a member of LAI and a member of the new Chapter.
- Outline of proposed Chapter activities and purposes.
- Timing, frequency and location of meetings.
- Program topics.
- Chapter structure and operations.

The RVP or other LAI designee should represent LAI at the meeting to demonstrate that support for the Chapter extends beyond its boundaries. Officers and members of nearby Chapters also may be invited, if practical, so that they may share their experiences and provide encouragement to the new Chapter. LAI has created a fund to help pay for such activities. See **Exhibit 2** for authorized travel expenditures for LAI representatives.

Applications for new LAI At-Large Members can be submitted at any time during the process of forming the new Chapter. The LAI Board of Governors will review the applications and may approve the new members at the next regularly scheduled Board of Governor's meeting. An At-Large Member becomes an active member for life upon approval of the Board of Governors. The At-Large Membership is not dependent on the proposed new Chapter completing the formation process. See **Exhibit 4** for the LAI New Member Application Form.

STEP 3: HOLD A CHAPTER ORGANIZATIONAL MEETING

Once an acceptable number of members and prospective members have been identified, a Chapter Organizational Meeting should be held. Please note that other formal and informal meetings may be held to gauge interest and rally support during the formation process. However, certain parliamentary procedures must be followed before a potential Chapter may petition LAI for a Chapter Charter, so promoting and conducting an actual formation meeting is desirable. **Exhibit 5** provides a checklist for preparing for this meeting. A sample meeting agenda is provided in **Exhibit 6**.

LAI's RVP or designated representative of LAI should be invited to the meeting. Other LAI representatives may attend to support formation of the Chapter.



At this meeting, the following actions are required:

- At least 10 potential members need to have accepted nomination as LAI At-Large Members. Membership applications should be forwarded to the LAI Executive Director.

Note: Submission and LAI approval of At-Large Members may occur before the proposed Chapter Organization Meeting. However, the Chapter Affiliation Agreement cannot be considered by LAI until the Steering Committee has submitted applications for at least 10 At-Large candidates. See **Exhibit 4** for the LAI New Member Application Form.

- The Chapter Affiliation Agreement and draft Chapter By-Laws should be discussed and approved. The draft Chapter By-Laws must be in general compliance with LAI's Standard Chapter By-Laws Template.
- The proposed Chapter's first president, vice president, treasurer, and secretary should be elected as pro-tempore officers. The members of the Steering Committee are often chosen as officers, but this is not a requirement.
- A list of proposed At-Large Members and prospective LAI members in your area (both those in attendance at the meeting and otherwise) should be compiled and reviewed.

Following the Organizational Meeting, the Steering Committee should formally petition LAI for a Charter by submitting the Affiliation Agreement signed by the requisite number of eligible qualifying signatures, along with a cover letter requesting a Chapter Charter. See **Exhibit 7** for sample cover letter.

- A. Prior to submitting the formal petition for a Charter, the Steering Committee must make sure the name of the local Chapter has been cleared and approved by both LAI and the incorporating local jurisdiction (state, province or country), the latter through a formal 'Name Search and Reservation'.

The Affiliation Agreement is accompanied, where possible, by these:

- A copy of Draft Chapter By-Laws approved by your members and signed by the Chapter's pro-tempore president.
- A list of the Chapter's pro-tempore officers (president, vice president, secretary, and treasurer).
- A roster of members consisting of no fewer than 10 individuals who are either current members of LAI or confirmed applicants. Resumes or short biographies for each proposed At-Large Member are required.

LAI's Board of Governors must approve all Chapter Charters by approval of a By-Law with requisite notice and a 2/3 vote standard.



The Board of Governors meets two times per year. The Affiliation Agreement and required documentation should be submitted not less than 3 months before the next LAI Board of Governor's meeting. LAI's Executive Director can provide meeting dates.

STEP 4: COMPLETE FORMAL APPROVAL ACTIONS FOR A NEW CHAPTER

Upon receipt of the nomination forms for At-Large Members and the executed Affiliation Agreement, the LAI Executive Committee and Board of Governors will begin the process to approve the At-Large Members and the Chapter Charter. Final approval of the At-Large Members, authorized LAI execution of the signed Affiliation Agreement and approval of a by-law to issue the Chapter Charter will take place at one or more regularly scheduled LAI Board of Governors meetings.

- A proposed Chapter may submit candidates for At-Large Membership at anytime during the processing of forming the Chapter. The designated RVP must take the responsibility to review and determine, for each member-At-Large candidate, that LAI's membership admission criteria have in fact been met. The proposed At-Large Members will determine the character of the Chapter; they need to reflect the Societies goals, purposes and aspirations from the outset.
- The RVP will submit a recommendation letter to the Executive Committee and Board of Governor's that accompanies each submittal for At-Large Membership by the proposed Chapter. **See Exhibit 8** for a sample RVP At-Large Membership Recommendation Letter.
- The designated RVP for the proposed Chapter will submit an Endorsement Report recommending approval of the issuance of a new Chapter Charter. See **Exhibit 9** for sample RVP Endorsement Report.

It is reliance on this Report and its opinion and recommendation that drives the Executive Committee and Board of Governor's decisions on funding, administrative support efforts and the Charter issuance procedures. The opinion of the RVP on this aspect transcends the mere admission recommendation. It extends to the process of assessing the advisability of the affiliation agreement and to the recommendation of issuing the Charter itself.

- The LAI President will send a letter to the Steering Committee authorizing the Steering Committee to expend funds subject to reimbursement by LAI following approval of the Chapter Charter. Receipts must be provided supporting all eligible expenditures. See **Exhibit 1** for the list of authorized expenditures that may be incurred by the Chapter and for the maximum authorized budget.
- The estimated travel budget for LAI representatives attending Chapter formation events is shown in **Exhibit 2**.



At the LAI Executive Committee Meeting:

- The Executive Committee may pass a resolution recommending to the Board of Governors approval for any or all of the candidates for At-Large Membership. Each Candidate must meet LAI eligibility criteria. See **Exhibit 10** for Resolution approving new At-Large Members.
- The Executive Committee may pass a resolution recommending execution of the requisite Affiliation Agreement and issuance of a Charter to the new Chapter. See **Exhibit 11** for Resolution recommending approval of issuing a Charter to the new Chapter.

At the Board of Governors Meeting:

- The Board of Governors may pass a resolution approving any or all of candidates for At-Large Members. See **Exhibit 12** for Resolution approving new At-Large Members.
- The Board of Governors may pass a By-Law by 2/3 vote accepting and approving the Affiliation Agreement and granting issuance of a Charter to the new Chapter. See **Exhibit 13** for Board By-Law granting Charter.
- The Board of Governors will hold a Chapter Charter Presentation ceremony upon Charter issuance. The President of the new Chapter should attend the Board of Governors meeting to receive the Charter. See **Exhibit 13 Attachment A** for sample Chapter Charter.



STEP 5: HOLD A CHAPTER INAUGURAL MEETING

Once the Chapter Charter is received or the Chapter has otherwise been informed by LAI of its acceptance, a Chapter Inaugural Meeting should be held. The procedure and format for the Organizational Meeting (see *Exhibit 6*) may be used again. However, be sure to indicate to the members, the local press and the larger community that this occasion marks the formal recognition of the Chapter, and that it will henceforth be considered a Chapter of LAI. See *Exhibit 14* for sample news release announcing formation of new Chapter.

The RVP or another LAI representative should attend and present the Chapter with a framed Charter document (a good photo-opportunity for the press).

At the Inaugural Meeting, the Chapter members should take the following actions:

- Hold an initiation ceremony for the Chapter's At-Large Members in accordance with the general requirements of the suggested form of Ritual, including the LAI pledge of allegiance. This duty is typically administered by the LAI President or Regional Vice President.
- Formally elect the Chapter officers (president, vice-president, secretary, treasurer).
- Hold an initiation ceremony for any candidates for membership who have not previously been approved by the Board of Governors as At-Large Members. New Members should be presented pins, certificates, and other LAI materials. See *Exhibit 3* for the New Member Form.
- The LAI representative (LAI President or Regional Vice President) should congratulate the Chapter on its Charter and status as a member of the Society.

The LAI member initiation ceremony and pledge is found in the LAI Chapter Operations Manual.

After Charter issuance, the Chapter must incorporate as a formal legal entity. Incorporation may take place before or after the Inaugural Meeting.



STEP 6: CHAPTER ADMINISTRATIVE ACTIONS

Once the new Chapter receives its Charter and officially becomes a Chapter of LAI, the Chapter officers will have to complete a number of administrative actions so that the new Chapter can be a fully functioning entity. These activities include:

- Filing incorporation returns.
- **Note:** A local Chapter must be incorporated after it has been Chartered. The Corporation can not be officially formed or created before Chartering, as the LAI Board can not have its name used in a formal incorporated entity before the LAI Board has sanctioned a Chapter in the locality, with a name and territorial area it approves.
- Setting up banking arrangements
- Setting up Chapter administrative procedures utilizing LAI's Chapter Operations Manual

During the early stages of a Chapter, developing the Chapter base of volunteers is one of its most important activities. See *Exhibit 15* for tips on attracting and keeping volunteers for the Chapters leadership positions.



SECTION 1: SAMPLE DOCUMENTS USED BY NEW CHAPTER STEERING COMMITTEE DURING FORMATION PROCESS

EXHIBIT 1

Authorized Reimbursable Formation Expenses for New Chapters

Table 1
LAI New Chapter Development
Authorized Expenses for New Chapter Formation

Chapter Start Up Costs	<u>Expenses of New Chapter</u>		<u>Travel Expenses of LAI Representatives Funded by LAI</u>	Comments
	Funded by LAI Up to \$ 5,000 Limit (1)	Funded by Local Chapter Above \$5,000 Limit (1)	Funded by LAI	
Meetings			Guideline (2)	
Recruitment Meeting			\$4,000	Approval from RVP and Chair of New Chapter Development Committee
Meeting Space	x	x		
Meal /Beverage	x	x		
Travel/Lodging/Per Diem Expenses			x	
Organizational Meeting				Approval from RVP and Chair of New Chapter Development Committee
Meeting Space	x	x		
Meal /Beverages	x	x		
Travel /Lodging/ Pier Diem Expenses			x	
LEW Meeting where Chapter Charter is Approved				
Travel / Lodging /Per Diem Expenses		x	x	
Lew Registration Fee (optional)		x	x	
Initial Chapter Meeting				Approval from RVP and Chair of New Chapter Development Committee
Meeting Space	x	x		
Meal/ Beverages	x	x		
Travel /Lodging/ Pier Diem Expenses			x	
Administration Costs of Recruitment of New Members				
Administrative Expenses				
Printing & Copying	x	x		
Postage & Delivery	x	x		
Communications (Telephone, emails, etc.)	x	x		
Chapter Administration	x	x		
Document Preparation	x	x		
Chapter Affiliation Agreement	x	x		
Member Applications	x	x		
Bank Account Set-up	x	x		
Legal associated with Incorporation				
Incorporation Legal Advice	x	x		
Incorporation Filing Fees	x	x		
Preparation of Chapter Bylaws	x	x		Local changes to Standard By-Laws

(1) \$5,000 Limit Set in October 15, 2006 New Chapter Financial Support Bylaw.

(2) Travel and miscellaneous expenditures may be incurred over multiple years for a single new Chapter. Typically, only LAI representative will attend the chapter meetings. In most cases, it will be the RVP. In select cases, additional representatives may be required to attend. This additional travel expense must be authorized in advance by the LAI President or 1st VP and Treasurer.

*Approval for extraordinary expenditures that occur between LEW meetings is as follows. The appropriate contact that is working with the proposed Chapter will submit a written proposal of the expenses sought to the New Chapter Development Committee (NCDC). The NCDC will review the proposal and make a recommendation to the Executive Committee. The Executive Committee will convene a teleconference to vote on the matter.

EXHIBIT 2

LAI Representative Travel Budget for Attendance at Chapter Formation Meetings as of October 2010

**Travel and Miscellaneous Expense Guidelines for LAI Representatives
(LAI President, Regional Vice President, or Designated Representative)**

	<u>Regional Vice President</u>	<u>International President Or Other LAI Designated Representative</u>	<u>Total LAI Expenses for a New Chapter (May be expended over multiple years)</u>
Recruitment Meeting			
Air Fare	\$600	Typically one	\$600
Hotel	\$250	LAI representative	\$250
Meals	\$100	will attend the	\$100
Ground Transport	\$100	Chapter meetings	\$100
Entertainment	\$100	In most cases, it will be the RVP.	\$100
Organizational Meeting			
Air Fare	\$600	In select cases,	\$600
Hotel	\$250	additional	\$250
Meals	\$100	representatives	\$100
Ground Transport	\$100	may be requested	\$100
Entertainment	\$100	to attend.	\$100
Initial Chapter Meeting			
Air Fare	\$600	This additional	\$600
Hotel	\$250	expenditure	\$250
Meals	\$100	must be authorized	\$100
Ground Transport	\$100	in advance.	\$100
Entertainment	\$100		\$100
Total LAI Representative Travel Expenses	\$3,450		\$3,450
Other Miscellaneous Expenses			\$550
Overall Budget Guideline for all Events - Rounded (1)			\$4,000
Cost Assumptions - (1)			
Average Airfare	\$600		
Average Hotel	\$250		
Meals	\$100		
Ground Transport	\$100		
Entertainment	\$100		

- Note: (1) These are average expenditure estimates.
 (2) Travel costs above the guidelines due to a new Chapter's location may be approved by the LAI President, 1st Vice President and Treasurer.



EXHIBIT 3

New Member Form

Complete this form and promptly return it to your Chapter or in the case of a Member-At-Large, the Executive Director of Lambda Alpha International. The information here will appear in the Lambda Alpha Directory. Please print all information.

(1)	Nominee's Name:	_____
	Mailing Information:	Title: _____ Company: _____ Address: _____ _____ Telephone: _____ Fax: _____ Email: _____ Website: _____

(2) AREAS OF INTEREST: *(twenty-five words)*

(3) SPEAKER TOPICS: *(twenty-five words)*

Return form to: <i>(Insert Chapter return information here)</i>	or Executive Director: Lambda Alpha International Attn: Executive Director Address: e-mail LAI@lai.org
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LAMBDA ALPHA INTERNATIONAL

THE HONORARY SOCIETY
FOR THE ADVANCEMENT OF LAND ECONOMICS

CHAPTER NEW MEMBER FORM

To register new members into the roles of Lambda Alpha, please have the new member complete the "NEW MEMBER FORM" and then the Chapter should complete the CHAPTER NEW MEMBER FORM" so new members can be properly entered into the Lambda Alpha Directory and membership certificates can be issued.

Staple the "NEW MEMBER FORM" and "CHAPTER NEW MEMBER FORM" together before sending to International.

Please include the International Initiation Fee for each new member along with these two forms. International will invoice annual dues in the calendar year following the new member's initiation.

Print all information:

(1) The individual named below will become a member of the _____ Chapter on _____ Please forward completed certificate and society key to: _____ by: _____

(2) Nominee's Name: _____

(3) Suggested wording for certificate citation (twenty-five words or less): "Awarded membership in recognition of:

Return both forms to:

Lambda Alpha International
Attn: Executive Director
Address: e-mail LAI@lai.org



EXHIBIT 4

LAI New Chapter Survey

Your Name: _____

We are considering establishing a Chapter of Lambda Alpha International (LAI) of senior practitioners in intersecting fields related to land economics. Please answer the following questions:

1) Are you a member of LAI (if no, skip to #4) Yes No

2) If yes, are you affiliated with a Chapter? Yes No

(This question and 3 below are only appropriate for a Chapter spin off)

3) If yes, which Chapter?

4) Would you be interested in participating in an LAI Chapter? Yes No

5) Would you serve on a committee or take a leadership role? Yes No

Please check any committee(s) that you would be interested in:

Membership Development & Retention Committee

Programs Committee

Communications Committee

Academics/Education and Bursary Committee

Do you know anyone else who would benefit from joining LAI?

Name:

Address:

Phone/Fax/e-mail:

Thank you for your time and interest. Please return this survey to:



EXHIBIT 5

Chapter Organizational Meeting Checklist

- Select date, time and venue (confirm that the venue is available for the desired date).
- Confirm that the principal parties (including outside guests) will be able to attend.
- Prepare an interesting program (arrange for an LAI representative to attend).
- Prepare an agenda (see sample on following page).
- Prepare and send out invitations (include r.s.v.p. request).
- Allow sufficient time for responses to be returned.
- Prepare a news release for local newspapers, business journals, etc. and send copy to LAI Headquarters for inclusion in LAI publications. If you need assistance, contact LAI Executive Director.
- Prepare the agenda, a proposed Chapter By-Laws, LAI membership literature and (if possible) brief resumes of potential officers as handouts for attendees.
- Introduce principals and guests.
- Approve Chapter By-Laws
- Elect officers, pro-tempore. (President, Vice President, Secretary, and Treasurer)
- Ask for volunteer leaders and solicit potential new members.
- Determine and announce next meeting (possibly the Chapter Inaugural Meeting).
- Follow up with personal calls to thank non-members and ask them to join.
- Follow up with members and thank them for their participation.
- Submit a brief meeting report along with any required documents resulting from the meeting to LAI Headquarters and Regional Vice President.

Required Documents include:

- Petition Letter Requesting New Chapter Charter
- Chapter Affiliation Agreement
- Proposed Chapter By-Laws
- List of Pro-tempore Officers
- List of active and potential At-Large Members (include Applications for proposed At-Large Members)



EXHIBIT 6

Chapter Organizational Meeting Sample Agenda

Location:

Date and Time:

- I. Welcome
- II. Introductions
- III. What is LAI (good role for invited President or RVP)
- IV. Why Form a Chapter?
- V. Presentation of Proposed Chapter Structure (geographical boundaries, officers, and By-Laws, etc.)
- VI. Question & Answer Period
- VII. Authorization of Affiliation Agreement and Charter Petition
- VIII. Election of Officers, pro tempore
- IX. Ask for Commitment
- X. Discuss Next Steps
- XI. Adjourn



EXHIBIT 7

Sample Petition Letter Requesting Chapter Charter

Date

Executive Director
Lambda Alpha International
PO Box 72720
Phoenix, AZ 85050

Re: Petition for a Charter of a (New Chapter Name) Chapter of LAI

Dear Ms. Hamilton:

Please consider this communication as a petition for a charter for a ____(New Chapter Name) Chapter of Lambda Alpha International. The undersigned are both Members at Large of Lambda Alpha International in good standing and are the pro tempore leaders of the proposed Chapter.

Thank you for your consideration. We look forward to your response.

Sincerely,

Name 1

Name 2

Cc: Regional Vice President –
International President
International First Vice President

New Chapter Development Committee Chairperson



SECTION 2: SAMPLE DOCUMENTS USED BY THE LAI EXECUTIVE COMMITTEE AND BOARD OF GOVERNORS DURING THE FORMATION PROCESS

Regional Vice President Recommendation for Approval of At-Large Members EXHIBIT 8

Sample Letter – Nomination of Atlanta Chapter At-Large Members

April 23, 2015

International President Lambda Alpha International
PO Box 72720
Phoenix, AZ 85050

Dear Mr. Gragg:

It has given me great honor, as Vice President, East Region, Lambda Alpha International (LAI) to spearhead an expansion project in the Southeast Region of the United States. The target community was Atlanta, Georgia. Fully utilizing the resources of consultations with the CEO, the International Office staff, East Region AVP Louis Slade and referrals for other LAI Chapters, we were able to develop a pool of candidates that met the criteria to become a member of LAI, an Honorary Land Economics Society. This initiative followed the approval by the Board of Governors Meeting, in Phoenix, AZ. Thus, in the Fall of 2008 an expansion campaign was launched. We were fortunate to partner with - Joan H. Herron – a former Ely Chapter member to spearhead our on-the-ground initiative in Atlanta.

Led by Ms. Herron, she was joined by David K. Elam, Sr. (FannieMae) and Paul L. Martin (Fortius Financial and Consulting) each of whom is richly qualified to meet the criteria for membership in LAI. Beginning in September 2008 and culminating in April 2009, we were able to pre-qualify Thirteen (13) Candidates for At-Large Membership. This was the minimum number of individual targeted to qualify for and At-Large status, the first step to granting a Chapter for a LAI Chapter. Each Candidate is patently aware that they have to be vetted by the Executive Committee and the Board of Governors. I, also, recognize that various time tables must be met in the process.

Thus it is with great pleasure that I, as Vice President, East Region nominate each of the following Candidates to be a Members At-large of Lambda Alpha International:

1. Joan H. Herron, President, Herron Consulting LTD; existing LAI member (Ely Chapter, now At-Large)
2. David K. Elam, Sr., Lead Director, Community Development, Fannie Mae



3. Paul L. Martin, Managing Director, Fortius Financial and Consulting
4. Robert (Bob) Price, Director, Herron Consulting LTD.
5. Tad Scepaniak, Principal, Real Property Research Group
6. Robin Spratlin, General Manager, Economic Development, Georgia Power Company
7. Charles (Chick) Krautler, Director, Atlanta Regional Commission
8. Allen Dedels, Associate Director, Cooper Carry
9. Barbara Faga, Executive Vice President, EDAW
10. Charles Whatley, Director, Commerce and Entrepreneurship, Atlanta Development Authority
11. Aasia Mustakeern, Partner, Epstein Becker Green, PC
12. Patsy Jo Hilliard, Former 3 time Mayor of East Point, GA
13. Jim Viviano, Associate, Cooper Carry
14. Russell Posey II, Senior Vice President, The Alter Group
15. Todd Greene, Assistant Vice President, Federal Reserve Bank of Atlanta

Each Candidate has submitted, as requested, (1) New Member Application, (2) Resume and (3) \$100.00 Application Fee. Ms. Joan Herron collected, assembled and then forwarded same to the Executive Director, Lambda Alpha International in Phoenix, AZ. This body of candidates are professionals with a high level interest and commitment to join LAI. Each is well regarded in their perspective disciplines and in their communities. Additionally, each Nominee is well aware that they are moving along a pathway toward qualifying to ultimately to petition the LAI Board of Governors to grant Chapter status to Atlanta, Georgia. The process is in compliance with the stated LAI By-Laws.

Thus with great pleasure, I nominate each of the afore-listed (13) Candidates to Members At-Large, in Lambda Alpha International.

Finally, I would like to express special thanks to the Board of governors – particularly, Leslie Pollock, Dr. James Fawcett, Ian James Lord and Terry Stevenson and her Staff Office for their direct support provided to this project. And, thanks to the various LAI Chapter members who provided the names of prospects for consideration for the Atlanta Project. Now, a special thanks to Joan H. Herron for her leadership in this Atlanta Project, along with David K. Elam, Sr. and Paul L. Martin.

Sincerely,
Ackneil M. Muldrow II Vice President, East Region
Ssb:amm
Cc: First Vice President, LAI

Regional Vice President
Assistant Vice President
Chair, New Chapter Development
LAI Executive Director



EXHIBIT 9

Regional Vice President Endorsement Report

Date _____

Mr/Mrs/Ms _____
 International President
 Lambda Alpha International Headquarters
 PO Box 72720
 Phoenix, AZ 85050

Re: Endorsement of the proposed _____ Chapter of Lambda Alpha International

Dear _____,

It has been an honor to work with the leadership of the proposed _____ Chapter and to see their efforts reach the stage where the Chapter is now requesting approval of a Charter Chapter from the LAI Board of Governor's.

In my opinion, the Chapter has fully met all of the requirements necessary for the Executive Committee and the Board of Governor's to consider granting a Charter to the _____ Chapter.

Requirement 1 – Signed Affiliation Agreement

The proposed Chapter has submitted the required signed Affiliation Agreement. The Affiliation Agreement is dated _____.

Requirement 2 – Draft Chapter By-Laws

The proposed Chapter adopted its Draft Chapter By-Law on _____. The Draft By-Laws are consistent with the LAI's Standard Chapter By-Laws.

Requirement 3 – Election of Pro-Tempore Officers

The proposed Chapter held a Chapter Organizational Meeting on _____. The Pro-Tempore Officers elected by the Chapter Steering Committee are:

President _____
 Vice President _____
 Secretary _____
 Treasurer _____



Requirement 4 – Nomination of at least 10 At-Large Members

The proposed Chapter currently has ___ At-Large Members and has submitted the nomination of ___ additional At-Large Members. I have personally reviewed each of the proposed candidates for At-Large Membership and believe that they fully meet LAI's membership criteria. These recommended members will provide an excellent membership base to support the on-going development of the Chapter. Approval by the Board of Governors of these At-Large Members would confirm meeting the initial membership requirements of LAI for forming a new Chapter.

Endorsement Summary

- (The RVP should use this summary section to briefly describe the history of the Chapter's efforts to form the Chapter).
- (The RVP should name the key local leaders who spearheaded the effort).
- (The RVP should describe key LAI members who aided the proposed Chapter in their effort to form the Chapter).
- (The RVP should also describe any key goals or plans that the proposed Chapter has adopted as part of its plan to develop a fully functioning and healthy Chapter).

Therefore, it is with great honor that I fully endorse the _____ Chapter to the LAI Executive Committee and Board of Governors for the approval and presentation of a LAI Chapter Charter.

Sincerely,

LAI _____ Regional Vice President



EXHIBIT 10

Lambda Alpha International - Resolution of the Executive Committee (Members at large)

MOVED BY: _____

SECONDED BY: _____

WHEREAS,

On the advice of (RVP name), Regional Vice President of the (insert region, that each proposed Member at Large listed in "Schedule A" meets all current requirements for membership in Lambda Alpha;

The Executive Committee has reviewed and agrees with the said recommendation;

NOW THEREFORE be it resolved and adopted that the proposed Members at Large listed in "Schedule A" be recommended for admission as Members at Large of Lambda Alpha.

AND THAT the Board of Governors be so advised, for disposition.

DATED at City, State, this Day of Month, Year

President

First Vice-President / or Secretary

"Schedule A"

Insert list of candidate members at large

EXHIBIT 11

Lambda Alpha International - Resolution of the Executive Committee (Chapter Charter)

MOVED BY: _____

SECONDED BY: _____

WHEREAS, in accordance with the By-Laws of Lambda Alpha International, a Petition with the requisite number of members has been received for the chartering of a new Chapter of Lambda Alpha International;

AND the proposed Chapter is to be known as the:

**** CHAPTER** (hereinafter the "Chapter")

AND the requisite Affiliation Agreement in the form and content of Schedule "A" hereto has been executed and received in compliance with the requirements for the formulation of the Chapter.

NOW THEREFORE BE IT RESOLVED, AND THE EXECUTIVE COMMITTEE HEREBY RECOMMENDS TO THE BOARD OF GOVERNORS OF LAMBDA ALPHA INTERNATIONAL THAT:

1. The Affiliation Agreement, in the form and content of that attached as Schedule "A" hereto, be received, accepted and approved; and
2. The Board of Governors authorize the issuance of a Charter in order that said Chapter be advised, created, constituted, confirmed and admitted as a Chartered member of Lambda Alpha International to enjoy all rights, privileges, authority, entitlement and benefits from time to time owing and due such said Chapters.

DATED at _____ this _____ day of _____, 201_

LAMBDA ALPHA INTERNATIONAL, PRESIDENT

LAMBDA ALPHA INTERNATIONAL, SECRETARY



EXHIBIT 12

Lambda Alpha International - Resolution of the Board of Governors (Members at Large)

MOVED BY: _____

SECONDED BY: _____

That the foregoing recommendation of the Executive Committee be received and adopted and the individuals listed in "Schedule A" be and the same are hereby each admitted as Members at Large of Lambda Alpha International.

DATED in City, State, this Day of Month, Year

President

First Vice-President / or Secretary

EXHIBIT 13

Lambda Alpha International - Resolution of the Board of Governors By-Law (Chapter Charter)

WHEREAS in accordance with the By-Laws of Lambda Alpha International authority is given to grant, issue and establish, by Charter, new Chapters of Lambda Alpha International;

AND the Executive Committee has certified compliance with the requirements of Lambda Alpha International for Charter issuance;

AND it is necessary, desirable and expedient to constitute a new Chapter;

NOW THEREFORE BE IT ENACTED THAT:

1. The Resolution of the Executive Committee dated _____, 20____ in respect of new Chapter formation is approved;
2. There be granted, issued and established by Charter the * **CHAPTER** (hereinafter the "Chapter");
3. The said Chapter shall represent the territorial jurisdiction described as:

4. The said Chapter is hereby advised, created, constituted, confirmed and admitted as a Chartered member of Lambda Alpha International and shall enjoy all the rights, privileges, authority, entitlements and benefits from time to time owing and due such said Chapters; and
5. A Charter in the form and text of that identified as Schedule "A" hereto be and same is hereby issued to the said Chapter.

DATED this ____ day of _____, 20____

Read a First, Second and Third time and finally passed in the City of

LAMBDA ALPHA INTERNATIONAL, PRESIDENT

LAMBDA ALPHA INTERNATIONAL, SECRETARY
(2/3 Majority Vote cast by Members Present)



SCHEDULE "A"

LAMBDA ALPHA INTERNATIONAL

THE HONORARY SOCIETY FOR THE ADVANCEMENT OF LAND ECONOMICS

CHAPTER CHARTER

UPON ACTION OF THE BOARD OF GOVERNORS, AND IN ACCORDANCE WITH THE BY-LAWS OF LAMBDA ALPHA INTERNATIONAL, AND UPON ACCEPTANCE OF THE DUTIES AND RESPONSIBILITIES SET FORTH IN THE CHAPTER BY-LAWS AND AFFILIATION AGREEMENT OF SAID CHAPTER

THIS CHARTER IS GRANTED TO THE

* CHAPTER

WHOSE MEMBERS SHALL BE DRAWN FROM

GIVEN ON THIS THE _____ DAY OF _____, 200__

IN THE CITY OF _____

PRESIDENT, LAMBDA ALPHA
INTERNATIONAL

SECRETARY, LAMBDA ALPHA
INTERNATIONAL

SECTION 3: SAMPLE DOCUMENTS USED BY NEW CHAPTER FOLLOWING APPROVAL OF CHAPTER CHARTER

EXHIBIT 14

Sample news release for inaugural Chapter meeting

_____, 20____
FOR IMMEDIATE RELEASE

Contact: _____
Phone: _____
e-mail: _____

LOCAL CHAPTER OF LAI INTERNATIONAL CHARTERED

Any-town, Anywhere – LAI has announced the official formation of a Chapter to serve the Greater Any-town Metropolitan Area.

_____, President of LAI will present the Charter to the Chapter at its next meeting, on the (day) at the (name of meeting place), address. _____, of _____ has been elected as the Chapter's first president.

The Any-town Chapter will hold monthly (luncheon) meetings from noon until 1:30 p.m. every second Tuesday at the _____. Each month will feature a speaker who will address various commercial, real estate and land economics related topics.



EXHIBIT 15

Tips for Attracting and Keeping Volunteers

1. Determine the capacity in which a potential volunteer might be willing to perform as well as his or her self interest or motivation.
2. Let members know what opportunities for involvement are available. "Cross market" by placing a box that members can check to indicate interest in serving on a committee in newsletters, meeting announcements, meeting evaluations, ballots, etc.
3. Give respondents more than one option on an invitation to serve. Include a "Not this year, but check with me next year" option to create a reservoir of future leaders.
4. Distribute a job description for each committee. Include functions, current status (newly created, standing committee, task force, etc.), expected time commitment, meeting regularity and times, etc.
5. Convey tangible benefits of getting involved. Stress leadership training, administrative and public speaking experience, networking beyond Chapter boundaries, potential for career advancement, etc.
6. Review the logistics of getting involved. How does one go about it? How easy is it? What kind of recognition is provided?
7. Follow up on offers to serve. Make sure the right person is advised of a member's interest in a particular area. Lack of response creates disillusionment and lost opportunity.
8. Ask! Many members may not respond to printed requests for service as noted above. A personal invitation, preferably by the Chapter president, can be more effective.
9. "Repackage" positions and tasks to create smaller assignments to accommodate time-strapped volunteers.
10. Use task forces as an alternative to committees. A specific task of limited scope and duration may attract members who would not consider a committee assignment. Short-term task forces also allow volunteers to be "recycled" in different assignments.
11. Encourage mentoring.
12. Stay in tune with the membership through surveys, focus groups and informal interviews. Reach beyond the board to the general membership for a different perspective.
13. Increase loyalty for the long term by being there when members need you. If you ask members to give to the Chapter, be prepared to give something back. Consider an outreach program for members who lose their jobs.
14. Foster a sense of family and team spirit, as well as membership in the larger community. Go beyond conventional meetings, building tours and social events and organize the Chapter for a community service project.

(Source: Adapted from an article by Annette E. Petrick, CAE in *Leadership 1995*)

