# CSA Chapter Quick Start Guide

**Get your charter first through CSA Global, if you haven't done that yet.  Make an email request to** chapter-startup@cloudsecurityalliance.org.
Online applications and quick start guides are also available online at the CSA site under Chapters tab.  You can also ask for guidance.

**Get a mentor from a successful chapter and use it for your startup and for your first few meetings.  For your chapter, contact the chapter coordinator and ask for a referral.**

Getting started is easier than you think; just do it!  It will evolve and you will adjust.

We have more detailed guides on each of these sections. This is meant to cover you from creating your board to hosting and covering costs for events out of the gate.

## Your board:

Get a team to get started:  You can do elections at your 1$^{st}$ meeting, and you can even ask for volunteers to run for these positions at that meeting.
Vote by hand after they give an introduction of their bio and qualifications.
- President
- Vice President
- Secretary
- Treasurer
- Speakers
- Sponsors
- Web site
- Membership Director

The Secretary and Membership Director are appointed, the President, VP, Treasurer and Director roles for Speakers, Sponsors and Web site are elected.  You can combine roles if it makes sense.

Speakers and membership roles have the most work and are the most critical, besides overall leadership.

President must be able lead the board and attract others.  If you have a weak or absent leader, your chapter will flounder and fail, or never get out of the gate.  Replace them if that happens; it will not get better.

Every role counts.
Who will sign-in at the door as people arrive?
Who will emcee the meeting?  Who will introduce the speaker?

## Get a facility

- Pick a date and frequency.
- For Phoenix, we host half day quarterly events.  We always serve food and it is stated in our announcement right up front.
- Align with a partner, a for-profit college that teaches information security, or a community college with a security track or certification.  Your local certification and training companies may offer free meeting space. Ask around for free meeting space referrals and locations.  It needs to be convenient access for attendees.  Parking should be plentiful, easy and free.

## Get your speakers:

- Get your kickoff speaker 1$^{st}$ as soon as you have a facility.  Base your date on your speaker.
- Industry leaders, CISOs especially good and they bring people in who would not attend otherwise.  You will never go wrong with a CISO level.  Developer security is another hot button—DevSecOps for cloud.  Aim for the highest common denominator.  If your speaker is bad, people will leave, and they will not return, if it is a 1$^{st}$ visit.  If your programs are poor, your chapter will fail.
- No commercialism, no vendor pitches
- Start creating your "speaker database--a list of speakers and their contact data.
- Issue a "Call for Speakers" with some speaker criteria once you have your dates and location figured out.  You'll get a great response once you have a pool of speakers.
- Use your board for pocket speakers—to use in an emergency to pitch-hit, or to speak when you first startup.  (IF they are good speakers in senior roles with compelling topics.)

## Sponsors:

Keep it affordable.  Keep it simple. Acknowledge them in announcement on web site, and in all that are sent out, and from podium at the meeting.  Be nice to your sponsors.  But manage them.

Our chapter allows sponsors to speak, but speakers are a separate piece, and sponsoring is separate and does not guarantee a speaking spot.  Some chapters charge people--sponsors to speak, but we don't.  Our sponsors are who pay most of our expenses and allow us to put on quality programs.

Vendors will often want to pay by credit card--decide up front if you need check payments, or if they pay for food, get it direct billed to them, Keep it as simple as you need.

Your goal is to cover your costs.  A best practice is to seek inaugural sponsors for annual renewable sponsorships at a good price point for the sponsor.    We have samples of these.

## Topics

Most any topic works that's relevant to our field.

It helps to have themes at meetings but it's not a requirement.  Ours are not themed.

## LinkedIn Site

- Host from CSA, but someone will need to do manage it, plus a backup.  Don't do your own.  It's just easier from the get-go to use what's already there, and it's more professional, branded, and less hassle and money.

## Event:

- Have food and drinks and announce that lunch or food is provided.
- More people will come if it's low or no cost, and includes food—IF you have compelling speakers and topics.
- If you do charge a fee, make it nominal, or make it free to those who register ahead, and charge for walk-ins or those not on your member list
- Allow guests anytime.  Allow walk-ins but encourage registration.  Walk-ins will offset no-shows.

## Finances:

- You'll need a checking account with authorized signers
- Alternatively, and to keep it simple, you can avoid handling money and have sponsors pay directly for related expenses (food & beverage)
- Over time, you will want a checking account, to handle expenses that are harder to handle through a sponsor
- You can charge member dues or event fees, if the value is well established for the audience.  CSA chapters are not this mature in most cases, and CSA does not charge chapter dues.
- Decide how you will accept payments.  If you accept credit cards, use Paypal account--that does take some overhead to administer and create pay links with Paypal, so you might now want this option.
- You can accept payments through Eventbrite, which is also a registration vehicle.  They charge a fee per transaction, and it's worth it.
- If you do not take payment in advance, and for free attendance, you will always have a large number of no shows—25-50%.  Count on it, and order food accordingly.  Un-registered walk-ins will offset some but not all of the no-shows.  Build it into your expectations.  If you are established, 25% is probably a good number.

## Announcements

- Post on your web site and other online sites as soon as you know the date and time. You can update it later with details.
- Send out a month ahead, another 2 weeks ahead, then 1 week ahead, then 2 days ahead for LAST call
- Be explicit in your subject line
- Use benefits in the What, When, Where, Why, Who, and How in your announcement.  In other words, Why would I want to come to your event?  Make it clear and compelling-- good copy writing.
- Ask them to invite their managers and colleagues –right at the top
- Be clear that guests are always welcome
- Ask them to register and include a registration url right up front
- Mention that free lunch is included, CPE certificates for certification holders, and list the speakers and topics as soon as you know them.
- People will often not commit until it gets very close to the meeting date.
- Have a place in your announcement for people to remove themselves from your "members" list
- We can provide a sample template for your mailing and to post to your online sites.

## CPE Credit Certificate

- Offer CPE certificates to attendees—you will be surprised at how many people care. List it as a benefit.  We'll give you a sample CPE certificate.  Our membership director prints these and brings them to the meetings, and sometimes sends them out by email to attendees.  We're trying to streamline this process to reduce the overhead.  It's valued though by our attendees.  Ours is for 4 hours, because we have 4 speakers and our program without breaks runs Noon-5.  We offer them for special events too.

## Mailing list

NOTE:  For Europe's GDPR, and for collecting personal data—names and email addresses, and company names and telephone numbers--you must comply to legal requirements, on how you collect, use and protect personal data about individuals. The covered individuals need to approve the use and purpose.  Ideally you have a means of subscribing, such as a Meetup group, LinkedIn, or other subscriber means.

- Plan to have a list you keep, for those who want to receive your announcements.  Opt-in is required, although you can initially invite people you know.
- Add your speakers and sponsors, so they receive announcements, and inform them. They can remove themselves anytime.
- Start a list of who you know, and who is likely locally to know greater #s of security professionals
- Try to target some companies to get membership.
- Contact everybody you know.
- Never share the list.
- Remove people immediately when they ask.

- Backup your list, and backup the person who maintains and keeps the list. Do not leave the list in the hands of a single board member. You risk losing your contacts when the individual leaves.

### Using the list:

When you get going, your members won't want to hear about every vendor's special program, but they WILL want to know about local security-related events, especially at low or no cost, that bring educational value. For instance, ISACA offers "almost-free" CISM & CISA exam prep sessions twice a year in Phoenix, and we usually tell our members about them, because it's good for education if you sit for those certs and for just learning at a very low cost. Same for annual security seminars and special offerings. Special does not mean a 10% discount, it means a big deal to our members, not the vendor. You don't want to turn into a vendor spammer--that's how the members will see it otherwise.

## Sponsors

- List your facility host as a sponsor.
- Find sponsors. You only need one for each meeting, to pick up catering/food costs.
- Get door prizes --they don't have to cost much, $25 Starbucks or Barnes & Noble gift cards, whatever's close to you. You can get these from sponsors too.
- Who wants to reach your audience? Vendors that you work with locally and from afar?

We have a sample 1-page sponsor document to share. We also have sample sponsor documents from chapters hosting their own conferences. These vary widely. Your chapter can work with whatever someone wants. Your goal initially is to cover costs for your chapter—catering or a venue.

Our chapter has a queue of sponsors. Once you get big enough, you can limit how many per-event or annual sponsorships you offer and how many can be at a chapter event. Your facility sponsor counts as one if you arranged to get it free through a local business.

**END**