



sam[®]

SOCIETY FOR ADVANCEMENT OF MANAGEMENT

Chapter Startup Guide

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SAM Organization

Society for Advancement of Management, Inc. is a nonprofit organization established in 1912 and founded for the purpose of promoting scientific study of the principles governing organized efforts in industrial and economic life. Today, we fulfill this mission through the study of management theory and practice.

What is SAM

SAM is the Society for Advancement of Management and is the world's oldest professional management society. We have a rich history of impact on the field of management and, in the spirit of continuous improvement, we look forward to many more years of leadership in the education, training and development of managers.

SAM Vision

The Society for Advancement of Management strives to be a leading edge management organization for facilitating learning, personal and professional development, and a network necessary to compete in today's global business environment. Our primary customers are Managers who wish to be informed on the practice of good management, Academicians interested in the applied practice of management through education, research, and training, and Students who aspire to management careers. By promoting and facilitating interaction among these three groups, we believe the art and science of management practice can be advanced to new levels of quality and effectiveness.

SAM Mission

To provide an opportunity for members to increase management skills and expertise through participation in programs and services designed to improve the professional quality of their knowledge, performance, and leadership ability.

These goals are achieved by:

- Involvement in national programs and activities.
- Communication and interaction with other management professionals.
- Peer-reviewed publications on the most effective managerial practices and theory.
- Personal commitment to advancing the art and science of management as an individual responsibility.

Our strategy is:

Participate - Communicate - Educate - Dedicate

SAM Structure

SAM operates with a volunteer board of directors. The board of directors is responsible for upholding the values of the society; setting policies, direction and priorities for the society; providing financial oversight; developing products and services for the benefits of members; and, under the direction of the President/CEO manage the daily affairs of the society.

The national office serves as a link for members both on an individual level as well as through the various types of affiliated chapters: professional, integrated, and collegiate.

Code of Ethics

Members of SAM aspire to the highest standards of professional conduct. A SAM member will model ethical and professional behavior through actions, not just words—avoiding the appearance of improper conduct. Practitioners, academicians, and student members of SAM, are to reflect the following values: integrity; fairness; loyalty to the Society and the institution each represents; objectivity in work and relationships; diligence in duties; avoiding conflicts of interest; guarding confidences; promoting non-discrimination; supporting the goals of the Society; giving the best performance to duties, efforts, and thought; and assisting in the ethical and professional development of the next generation of managers.

Organizational Benefits of Your Chapter

Professional and Collegiate Chapters affiliated with the society enjoy a number of benefits. Each chapter establishes its own bylaws, and while those bylaws must not conflict with the national organization, each chapter enjoys individual autonomy. Additional benefits include:

Chapter Network - The same way that individual members receive benefits, chapters also benefit from exchanging information between similar organizations. Starting your chapter connects you with our expanding network of chapters and management professionals.

Financial Autonomy & Support - SAM collects dues from all members nationally. If your chapter collects additional

local dues, the national office will assist with invoicing and remitting your chapter's portion so members receive one invoice for all membership dues.

Chapter Operations Handbook - A free tool designed to assist chapter leaders in the management and operation of their chapter. The manual provides a wealth of information on professional meetings, volunteer structures, and other areas of interest to chapters.

International Business Conference - Held in the spring, the SAM International Business Conference offers workshops, seminars, and training opportunities for members. Collegiate chapters also have the option to submit teams for the annual case competition as well as being recognized at the annual awards banquet.

Society Awards Program (SAP) - This program provides information and recognizes chapters who achieve excellence in operations, service to members and their community. Each year a planning guide is available as well as materials for submitting the required annual chapter report. This program helps chapters maintain good standing while awarding an annual achievement level for their accomplishments.

Member Benefits of Affiliation

You can be proud of belonging to an organization that has many student chapters throughout the U.S. Professional and Collegiate members are given the opportunity to develop management skills while connecting with the global management community.

In addition to being members of the world's oldest management society, they receive opportunities to serve on national committees and panels; as well as the following benefits:

- Award Winning Publications
- Networking Opportunities
- Professional Development
- Chapter Management Opportunities
- Access to "Think Tank" of Management Professionals
- Discounted fees for Annual Conference

Chartering Requirements

The chapter chartering process requires that chapters have a minimum number of members who have submitted and paid dues to the national office.

Professional chapters must have a minimum of 5 paid members. Professional chapter membership dues are set by SAM National.

Integrated Chapters are professional chapters that have formalized affiliation agreements formalized agreements with a recognized collegiate chapter. Integrated chapters are designed to directly connect students and management professionals.

Collegiate Chapters are required to have a minimum of 5 collegiate members and at least 1 college faculty or staff member who will serve as the chapter advisor. Collegiate chapter membership dues are set by SAM National

Charter Process

The chapter charter process is simple. If you are interested in having a group affiliated with the Society for Advancement of Management, contact our national office to see if there is an existing chapter in your area.

The Society offers two types of chapter charters, these are Professional and Collegiate Chapter charters. In both cases the process for affiliating is the same.

- **Contact our National Office** to notify us of your interest in starting a chapter. We will collect some basic contact information to help connect with you and, when possible, connect you with a local contact. **Complete a Petition for Chapter Affiliation.** Return a completed application to our National office and our staff will forward your petition to our board of directors. Upon review and approval, the Society will issue a charter.
- **Submit a copy of Local Chapter Bylaws.** Create and review the structure and content of your chapter bylaws using our model chapter bylaws as a guide. As an autonomous organization, your bylaws may be different but must conform to the mission and vision of the organization.

- **Roster of Proposed Membership.** Submit a list of your proposed chapter's current membership. The list should include the names of your officers and directors and the designation of a main chapter contact.
- **Complete a signed Chapter Charter Agreement.** The charter defines the relationship between SAM and your chapter. Information in the charter should be shared with your board and membership so they understand the affiliation between the two organizations.
- **Collegiate Chapter Addendum & Administrative Support Statement.** For Collegiate Chapters, this statement submitted on school letterhead shows support from college administration for the new student organization.
- **Submit Completed Materials to SAM National.** Once you have completed the necessary forms (Petition for Chapter Affiliation, Local Chapter Bylaws, Membership Roster, and Chapter Charter Agreement). Once you have completed the necessary forms, submit your application packet to the national office. Use our helpful checklist to ensure you have submitted a complete package. Incomplete packages will delay your approval for chapter affiliation.

Congratulations!

The chapter affiliation process is long, but once you have completed it you will receive a charter issued through our national office. Traditionally, a chartering ceremony should take place to celebrate the inception of your affiliated organization. Some suggestions to help you plan for this include:

- Assign responsibility to a committee or individual to handle the arrangements, publicity, and invitations.
- Choose the date of the ceremony.
- Arrange for a meeting place at least three to four weeks in advance.
- Prepare news releases for the local media (newspapers, radio, community TV, etc.). A sample press release can be found on our national website www.samnational.org
- Send invitations to your chapter members and prospective members in your area. Extend invitations

- to local area business leaders, your chamber of commerce, local government officials, etc.
- The event should be festive, this is a public first opportunity for your chapter to make itself known. Memorable events and activities like this are opportunities for long term growth and sustainability.
- Chapter officers may be officially installed at this event. If possible a representative from our national office will make arrangements to attend the ceremony and install your leadership team.
- Presentations are in order and the national office will supply you with an individual chapter charter suitable for framing.
- The national office will help with additional suggestions or assistance should you need it. Please feel free to contact us.
- Once your chapter is officially an affiliate, you'll want to take advantage of the benefits of affiliation, including sharing the brand recognition the Society has created.

Part of the signed Chapter Charter Agreement is a licensing agreement to use a logo branded by SAM. Chapters are expected to prominently display the logo on all chapter materials and communication pieces. A statement of affiliation should also be included when appropriate.

It is important that the logo is correctly displayed in accordance with the Branding Standards adopted by the Society. Questions on the use of the SAM logo should be directed to the national office.

Integrated Chapters

The Society for Advancement of Management recently launched our Integrated Chapters program promoting connections between the National Organization, Local Chapters, and Collegiate Chapters. Integrated Chapters are Professional Chapters that sign additional affiliation agreements with a recognized Collegiate Chapter and each organization supports the other in an effort to further the mission and vision of the Society.

MODEL CHAPTER BYLAWS

ARTICLE 1 - NAME AND AFFILIATION

Section 1.1: Name. The name of the Chapter is: _____

(herein referred to as “chapter”).

Section 1.2: National Affiliation. The chapter is affiliated with the Society for Advancement of Management (herein referred to as “SAM”).

Section 1.2: Relationships. The chapter is a separate legal entity from SAM. It shall not be deemed to be an agency or instrumentality of SAM, and SAM shall not be deemed to be an agency or instrumentality of the chapter. The chapter shall not contract in the name of SAM without the express written consent of SAM.

ARTICLE 2 - PURPOSE

The purposes of the chapter, as a non-profit organization, are:

- to provide a forum for the personal and professional development of our members;
- to provide an opportunity to develop leadership, managerial, public speaking and group decision-making skills;
- to provide an opportunity to focus on current management issues of importance to our members;
- to provide valuable information gathering and dissemination channels;
- to provide a pool of management leaders for perpetuation of the chapter and of SAM;
- to serve as a vehicle for transitioning graduates and new management professionals into SAM;
- to serve as a source of new members for SAM; and
- to serve as part of a channel of communications between SAM, recognized collegiate chapters, and the professional community.

ARTICLE 3 - FISCAL YEAR

The fiscal year of the chapter shall be the calendar year.
(*Fiscal year changes are permitted, but must be submitted to the national office for record keeping*)

ARTICLE 4 – MEMBERSHIP & DUES

Section 4.1: Qualifications for Membership. The qualifications for membership in the chapter shall be as stated in Sections 4.3, 4.4, 4.5, and 4.6 of this Article. To achieve the mission of the chapter there shall be no discrimination in individual memberships because of race, religion, sex, age, national origin, disability, veteran’s status, or any other legally protected class.

Section 4.2: National Membership. All members of the chapter are required to be members of the national organization.

Section 4.3: Individual Membership. Membership in the chapter is held in the individual’s name.

Section 4.4: Professional Members. Professional membership shall open to those who are interested in furthering the profession of management and/or improving their own membership skills. Professional members may vote and/or hold office in the chapter.

Section 4.5: Collegiate Members. Individuals who are (a) enrolled either as full-time or part-time students, at freshman standing or higher; and (b) enrolled in the equivalent of at least six (6) credit hours are eligible to join and be recognized as SAM Collegiate members.

As a professional chapter, student members *may/may not* (select one) vote or hold office in the chapter. (Remove this provision if not a professional chapter.)

Section 4.6: Application for Membership. Application for membership shall be on the chapter application form. All applications shall be reviewed by the Vice President of Membership and approved by the Board of Directors or their designee. New members shall be afforded full membership rights from the date of application approval by the Board of Directors or their designee.

Section 4.7: Dues. The chapter Board of Directors may establish annual dues for the chapter. Chapter dues are in excess of dues required for national membership.

Section 4.8: Termination of Membership. Any member failing to maintain membership in SAM will forfeit his/her membership in the chapter.

ARTICLE 5 - MEMBER MEETINGS

Section 5.1: Regular Meetings. Regular meetings of the members shall be held monthly or as otherwise determined by the Board of Directors.

Section 5.2: Annual Meetings. The annual meeting of the members for electing Directors and Officers, and conducting other appropriate business shall be held in November or at such other time as determined by the Board of Directors.

Section 5.3: Special Meetings. Special meetings of members shall be held on call of the President, the Board of Directors or by any three directors.

Section 5.4: Notice of Meetings. Notice of all special and annual meetings shall be given to all members at least ten days prior to the meetings. Notice of regular meetings shall be given to all members at least seven days prior to the meeting.

Section 5.5: Quorum. Members holding one-tenth of the votes entitled to be cast, represented in person or by conference call, shall constitute a quorum. The vote of a majority of the members present at any meeting at which there is a quorum shall be necessary for the adoption of any matter voted on by the members, except to the extent that applicable state law may require a greater number.

ARTICLE 6 - BOARD OF DIRECTORS

Section 6.1: Power and Duties. The Board of Directors (also referred to as the “Board”) shall manage and control the property, business and affairs of the chapter and in general exercise all powers of the chapter.

Section 6.2: Officers. The following shall be members of the Board of Directors and shall be officers of the chapter: President, Executive Vice-President, Vice-President of Membership, Vice-President of Programs, Vice-President of Communications, and Vice-President of Financial Affairs.

Section 6.3: Composition of the Board of Directors. Along with the officers listed in Section 6.2 of this Article, the Board of Directors shall also include the Past President and eight Directors. These shall constitute the governing body of the chapter.

Section 6.4: Qualifications. All candidates for the Board of Directors must be members of the chapter in good standing at the time of nomination or appointment and for their complete term of office.

Section 6.5: Election - Term of Office. Officers and directors shall be elected by the members at the annual meeting of the membership from the proposed slate of the nominating committee appointed by the Board of Directors at the beginning of each election year. Each elected officer and director shall assume office on January 1 following his/her election and shall hold office for two years or until his/her successor is elected and takes office. Officers may not be elected to serve more than two (2) consecutive terms in the same position.

Section 6.6: Election - Cycle. To maintain stability for the chapter, officers of the chapter will be elected in staggered two year cycles with the President, Vice-President of Membership, Vice-President of Communications being elected in even years; and Executive Vice-President, Vice-President of Programs, and Vice President of Financial Affairs being elected in odd years.

Section 6.7: Vacancies. Any vacancy in the Board may be filled for the unexpired term by appointment of the President with the consent of the Board of Directors.

Section 6.8: Quorum. A simple majority of the total Board of Directors shall constitute a quorum for the transaction of business. The act of a majority of the Board of Directors present at any meeting at which there is a quorum, either in person, by conference call or other teleconferencing option, shall be the act of the Governing Body, except to the extent that applicable state law may require a greater number. In addition, the Board may act by unanimous written consent of all voting members.

Section 6.9: Board of Directors' Responsibilities. The Board of Directors shall transact all business of the chapter except as prescribed otherwise in these Bylaws or other governing instruments of the chapter. A member in good standing may request the President to place on the agenda of the next regular Board of Directors meeting any action for consideration by the Board of Directors.

Section 6.10: Removal of Director and Officer. Any officer or director may be removed from office, with cause, upon an affirmative vote of two-thirds of the entire Board of Directors at a duly constituted Board of Directors meeting. The officer or director shall be entitled to a due process hearing prior to any termination action being imposed.

ARTICLE 7 - DUTIES AND RESPONSIBILITIES

The responsibilities of each member of the Board of Directors shall be as outlined in the position descriptions maintained by the Vice-President of Communications and distributed to the chapter Board. The position descriptions are subject to change as deemed necessary by the President and/or the chapter Board. All members of the Board must maintain current membership in good standing with SAM throughout the duration of his/her term of office.

Section 7.1: The President. The President shall preside at the meetings of the members and of the Board. He/she shall direct the Chapter and have charge and supervision of the affairs and business of the Chapter, subject to the ultimate management authority of the Board of Directors.

Section 7.2: The Executive Vice-President. The Executive Vice-President, at the request of the President or in his/her absence or disability, may perform any of the duties of the President. He/she shall have such other powers and perform such other liaison duties as the Board or the President may determine. He/she shall succeed the President in the event the President is unable to continue to serve.

Section 7.3: The Vice President of Membership. The Vice President of Membership shall serve as chair of the Membership Committee. He/she shall encourage chapter and SAM membership growth and shall maintain the official membership roster of the chapter. He/she shall have such other powers and perform such other duties as the President may determine.

Section 7.4: The Vice-President of Financial Affairs. The Vice-President of Financial Affairs shall be responsible for the financial affairs of the chapter, including all required filings. These responsibilities shall include financial reports to the Board and coordinating arrangements for the annual examination audit of the accounts as may be required by the Board. He/she shall be responsible for membership billing He/she shall also perform such other duties as the President may determine.

Section 7.5: The Vice-President of Communications. The Vice-President of Communications shall serve as the chair of the Communications and Public Relations Committee. Additionally, he/she will be responsible for recording the minutes of all meetings of the chapter, shall be responsible for making all members aware of such meetings, and shall be responsible for coordinating the activities related to the chapter's newsletter.

Section 7.6: The Vice-President of Programs. The Vice-President of Programs shall serve as the chair of the Programs Committee and be responsible for planning, implementation, coordination and execution of the activities of the chapter.

Section 7.7: The Past President. The Past President shall serve as an advisor to the President, and fulfill such duties as requested by the President and/or Board of Directors. He/she must maintain current membership in good standing with SAM throughout the duration of his/her term of office.

Section 7.8: Directors. Directors shall serve on the Board and committees as appointed and provide subject matter expertise and experience while in service to the chapter. Directors will fulfill such duties as requested by the President and/or Board of Directors.

ARTICLE 8 - COMMITTEES

Section 8.1: Committees. The establishment of both standing and ad-hoc committees shall be the right of the Board of Directors.

Section 8.2: Committee Organization. Committees in addition to the Nominating Committee are established by resolution of the Board of Directors.

Section 8.3: Committee Chairpersons. Appointment of chairpersons to committees is the sole responsibility of the President. The Chairperson and the President will seek interested members to participate in committee activities. Special committees or task forces may be organized by the President to meet particular chapter needs.

Section 8.4: Committee Activity. Committees are established to provide the chapter with special ongoing services, such as Membership, Programs, Professional Development, Communications, Marketing/Public Relations, etc.

ARTICLE 9 – COLLEGIATE CHAPTER AFFILIATION

A Professional chapter may, as determined by the chapter's Board of Directors, affiliate with Collegiate chapters to provide support and services consistent with the mission of the society. Upon request from both chapters SAM will convene a meeting between the two organizations to process the request.

Collegiate chapter affiliation is open to educational institutions: a) offering, at minimum, a baccalaureate degree in a management-related discipline; b) accredited by one of the six regional accrediting bodies recognized by the U.S. Department of Education and the Council for High Education Accreditation; and c) have Collegiate chapters that are registered and in good standing with the national office.

ARTICLE 10 - ELECTRONIC VOTING

Mail or electronic ballots can be used for the election of Directors provided the chapter has had at least one in-person meeting that year. In the event a substantial number of officers and directors are unavailable to conduct business in a given month, the chapter may facilitate the business of the organization via electronic communication means and the minutes and voting records of the meeting will be distributed via the Vice-President of Communications.

ARTICLE 11 - STATEMENT OF ETHICS

The chapter adopts SAM's Code of Ethics for members in order to promote and maintain the highest standards among our membership. Each member shall honor, respect and support the purposes of this chapter and of the Society for Advancement of Management. The Code of Ethics reads as such; Members of SAM aspire to the highest standards of professional conduct. A SAM member will model ethical and professional behavior through actions, not just words—avoiding the appearance of improper conduct. Managers, academicians, and student members of SAM, are to reflect the following values: integrity; fairness; loyalty to the Society and the institution each represents; objectivity in work and relationships; diligence in duties; avoiding conflicts of interest; guarding confidences; promoting non-discrimination; supporting the goals of the Society; giving the best performance to duties, efforts, and thought; and assisting in the ethical and professional development of the next generation of managers.

ARTICLE 12 - ACTIVITIES

The Chapter shall not be represented as advocating or endorsing any issue unless approved by SAM. No member shall actively solicit business from any other member at chapter meetings.

No part of the activities of the chapter shall consist of carrying on propaganda, or otherwise attempting to influence legislation, and the chapter shall not participate in, or intervene in (including the publishing or distribution of statements), any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these Bylaws, the Organization shall not carry on any activity not permitted to be carried on (a) by a corporation exempt from Federal income tax under Section 501(c) (3) of the Internal Revenue Code.

No part of the net earnings of this chapter shall inure to the benefit of any one member or individual, and no member, officer, or employee of the society shall be entitled to receive any income of profit.

ARTICLE 13 - PARLIAMENTARY PROCEDURE

Meetings of the chapter shall be governed by the rules contained in Robert’s Rules of Order (newly revised) in all cases to which they are applicable and in which they are consistent with the Law and the Bylaws of the Chapter.

ARTICLE 14 - AMENDMENT OF BYLAWS

The Bylaws may be amended by a majority vote of the membership at the annual meeting of members or by 2/3 vote of the Board of Directors. Amendments passed by the Board of Directors must be submitted to the membership for review no later than 15 days prior to a vote on such amendment.

ARTICLE 15 - CHAPTER DISSOLUTION

In the event of the dissolution or final liquidation of the chapter, none of the property of the chapter nor any proceeds thereof shall be distributed to or divided among any of the members, officers or trustees of the chapter or inure to the benefit of any individual.

After all liabilities and obligations have been paid, satisfied

and discharged, or adequate provision made therefor, all remaining property and assets shall be distributed to one or more organizations designated by the Board of Directors at the time of dissolution.

Upon the dissolution of the chapter, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

RATIFICATION

Ratified by the Membership of the Chapter and signed by:

Chapter President Date

Chapter Vice-President of Communications Date

Chapter Advisor (if applicable) Date

CHAPTER CHARTER AGREEMENT

Charter for the _____

Insert Chapter's Full Legal Name

Chapter # _____, an affiliate of the Society for Advancement of Management.

Insert Chapter's Number

This Charter confirms that the Society for Advancement of Management "SAM" has conferred Chapter status upon the _____, hereafter known as the "Chapter".

Insert Chapter's Full Legal Name

For the duration of this charter, the terms and conditions of the Chapter relationship between SAM and the Chapter include the following:

1. *Name of Chapter* - The name of the Chapter is:

_____.

Insert Chapter's Full Legal Name

2. *Purposes* - This Charter and the chapter relationship evidenced hereby are for the mutual benefit of the Chapter and SAM and their members. The purposes of the Chapter must be in furtherance of the purposes of SAM, and consistent with the SAM bylaws as the same may be amended from time to time, and with the Chapter's governing instruments which have been approved by SAM. This Charter is intended to provide protection and guidance regarding each party's rights and responsibilities.

3. *Separate Legal Existence of Chapter/Autonomy* - Chapter is a separate legal entity from SAM, and neither Chapter nor its officers, agents or employees may hold themselves out as an agent of SAM. The Chapter is not an agency or instrumentality of SAM; nor is SAM an agent or instrumentality of Chapter. Chapter shall not contract in the name of SAM, or incur any financial or other obligations on behalf of SAM, without the express written consent of the SAM President/CEO or the SAM Chair of the Board. Chapter may hold itself out to the public as an "affiliate" of SAM; but may not hold itself out as SAM. Chapter shall have autonomy with regard to all phases of its operation, subject to its governing instruments.

4. *Chapter Financials, Information & Tax Returns* - Chapter's financials are separate from those of SAM; and Chapter is responsible for obtaining its own tax exemption and filing its own information and tax return as required by applicable law. Chapter shall be exempt from

Federal and State income tax as evidenced by a letter of determination from the Internal Revenue Service and any required approval letter from state tax authority.

5. *Financial Incentive Programs for Chapter* - Chapters shall be eligible for direct financial incentive payments made by SAM to Chapters in accordance with such chapter financial incentive programs as may be established and maintained by SAM.

6. *Governing Instruments of Chapter* - The governing instruments of the Chapter consisting of bylaws, are approved by SAM. Amendments to such governing instruments shall not be effective unless and until approved by the SAM President/CEO or his/her designee.

7. *Chapter Membership Requirements* - Chapter shall meet the requirements for number of Chapter members who are SAM members, which may be amended from time to time, by the SAM Board of Directors.

8. *Reporting by Chapter* - Chapter shall report to the SAM President/CEO or his/her designee on an annual basis as to the financial results and general activities of the Chapter.

9. *License of Right to Use SAM Name, Acronym, and Logo* - SAM is the exclusive owner of the "Society for Advancement of Management" name, the acronym "SAM," and the SAM Logo. For as long as it remains a chapter of SAM, Chapter shall have the non-exclusive right, by this license from SAM, to use the "Society for Advancement of Management" term in its name, and to use the SAM

Marks to indicate that it is a chapter of SAM and an affiliate of SAM, said use to be strictly in accordance with the Branding Standards adopted by the SAM Board of Directors.

Any use of the “Society for Advancement of Management” name or the “SAM” acronym by the Chapter must be in conjunction with the Chapter name, and may not be a standalone use independent of the Chapter name.

In addition, for as long as it remains a chapter of SAM, Chapter shall have the non-exclusive right, by this license from SAM, to use those other SAM trademarks which the SAM Branding Standards expressly authorize Chapters to use; and such use must be strictly in accordance with those SAM Branding Standards (may be referred to collectively as the “Licensed Marks.”)

With respect to each of the Licensed Marks:

- The Chapter’s license to so use such marks expires upon the termination of Chapter’s status as a chapter of SAM.
- The Chapter has no right to sublicense or otherwise assign any portion of this license to use the Licensed Marks.
- The Chapter shall not use the Licensed Marks in any manner that is inconsistent with the purposes of SAM or in any manner which would damage the reputation of SAM, or adversely affect the validity of SAM’s rights in the Licensed Marks.
- The Chapter shall not use any of the Licensed Marks to indicate or imply endorsement or sponsorship by SAM without the express written consent of SAM.

All actions taken by Chapter in connection with the Licensed Marks, and all products, programs, and other services offered by the Chapter under the Licensed Marks, must be consistent with the purposes of SAM, and in compliance with the SAM Bylaws, as amended from time to time.

SAM has the right, at all reasonable times, upon reasonable advance notice, to request copies of or inspect the materials upon which the Licensed Marks are used in order that SAM may satisfy itself that such uses of the Licensed Marks meet the standards, specifications and instructions previously approved by SAM as set forth in the Branding Standards guide.

10. Membership List - SAM and Chapter shall be joint owners of the list of names, mailing addresses, e-mail addresses, and phone numbers of those individuals who are members of both SAM and the Chapter, (hereafter “Joint Members”) without any duty to account to the other for any profits derived from such list.

11. Withdrawal of Chapter Status - SAM may withdraw Chapter’s status as a chapter of SAM, and terminate this Charter, for the reasons set forth in the SAM Bylaws as amended from time to time, including without limitation the request of Chapter, in accordance with the procedures set forth in such SAM Bylaws.

By signing this Charter Agreement, the Chapter acknowledges the terms hereof:

Chapter President Date

Chapter Vice-President of Communications Date

Chapter Advisor (if applicable) Date

PETITION FOR CHAPTER CHARTER

Petitioning Chapter's Full Legal Name

This petition for Chapter Charter with the Society for Advancement of Management is hereby submitted to the Society's Board of Directors for consideration by the undersigned officers.

We, as officers and representatives, feel that SAM Affiliation will benefit both this organization and the Society. We agree to conform to all rules and bylaws of the Society and will do all we can to increase and maintain standards of excellence in the Management discipline and SAM.

The names and addresses of the following officers are listed below

Chapter President

Address

Phone | Email

Company / College

Vice President of Membership

Address

Phone | Email

Company / College

Executive Vice-President

Address

Phone | Email

Company / College

Vice President of Communications

Address

Phone | Email

Company / College

Collegiate Chapter Advisor (*if applicable*)

College

Address

Phone | Email

COLLEGIATE CHAPTER ADDENDUM

Support for your Collegiate Chapter from your college's administration is important to the success of your chapter. Please submit the Collegiate Chapter Addendum with your completed application.

College Name : _____

The above listed college administration has met and decided the following:

This chapter is/will be a recognized Student Organization by the Institution? Yes No

In no, please explain: _____

The chapter will receive institutional funding for operating activities from the Institution? Yes No

If no, please provide an attached statement explaining how the chapter will be financially supported.

College Administration Officials will permit chapter members to wear official society graduation regalia at commencement ceremonies or other graduation related activities? Yes No

Signature of Collegiate Chapter Advisor Date

Print College Administrator Name & Title

Signature of College Administrator Date

In addition to the above listed addendum please prepare the following statement on college letterhead, signed by your College's Senior Academic Officer (Academic Vice-President, Provost, Etc.), in support for your collegiate chapter.

To the Society for Advancement of Management Board of Directors:

We, the following full-time business faculty and head of the (Your Institution's Business/Management-Related Program's Name Here) of (Your Institution Name Here) have read the Bylaws of the Society for Advancement of Management, are heartily in accord with the purposes of the organization, and are desirous of organizing a collegiate chapter.

We believe that the students, faculty members and administration of (Your Institution Name Here) would benefit from and welcome a chapter on our campus. In addition, we have obtained any necessary approval at the institutional level and agree to encourage and support this Society in fulfilling its purpose of recognizing scholarship and accomplishment among students of business, management, and administration. We further certify that (Your Institution Name Here) is accredited by the (Your Accrediting Body Here) accrediting agency. It is therefore respectfully requested that the Board of Directors grant a charter to this petitioning group.

In anticipation of the approval of this petition, we pledge that we shall comply with the provisions of the governing documents of the Society for Advancement of Management.

SUBMISSION CHECKLIST

Congratulations! You are ready to submit your Chapter Application to the Society for Advancement of Management. Please ensure the following documents are included in your submission:

- [Petition for Chapter Affiliation](#)
- [Chapter Bylaws](#)
- [Chapter Charter Agreement](#)
- [Membership Roster](#)
- [Collegiate Chapter Addendum & Administrative Support Statement \(if applicable\)](#)

Forward the complete application packet to the SAM National Office.

