



## **SQA Regional Chapters**

### **Manual of Services provided by SQA HQ and Service Agreement**

This manual includes an overview of the administrative services provided to the Regional Chapters by SQA and the annual agreement and payment structure.

If you have any questions regarding services provided to the Chapters, please contact SQA Chapter Liaison, Sarah Ray, or Alison Cockrell, SQA Executive Director.

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## **Table of Contents**

Management/Accounting Services .....	3
SQA Regional Chapters Annual Information/Documentation Required.....	4
Membership Database .....	5
Membership Dues .....	6
Communication and Social Media Services .....	7
Meeting Services .....	8
Procedure for Requesting Regulatory Speakers .....	9
Election/Balloting Services .....	10
Archives .....	11
Webinar Services .....	12
Survey Tools.....	13
Website Maintenance.....	14
Service Agreement .....	15

## **Management/Accounting Services**

SQA provides the following management/accounting services for the U.S. Chapters:

- Banking services
  - a. Maintain records for Chapter bank account
  - b. Provide continuity for account location
- Bookkeeping services
  - a. Accounts payable
    - i. Payments authorized by Chapter officer
  - b. Account receivable (credit cards and checks)
  - c. General ledger maintenance
  - d. Financial report
    - i. Distributed to Chapter at regular intervals
- Prepare/submit IRS tax returns
- Insurance
  - a. General Liability Insurance
  - b. Directors and Officers Insurance
- Contract review – it is recommended that you send event contracts to the SQA Executive Director and/or Conference Director for review prior to signing.
- Bylaws review – please send the SQA Executive Director a copy of your revised Bylaws prior to sending to your members for vote (this is also applicable to CCSQA).

Chapter finance reports are distributed by HQ to each Chapter Treasurer monthly. The reports are sent at the end of the month for the finances reported in the previous month. For example, the March finance report will be distributed at the end of April.

**SQA Regional Chapters Annual Information/Documentation**  
**Required at Beginning of Each Calendar Year**

- Current Year Financial Policy – if you want to be included in the SQA group tax return, you must complete and follow the [financial policy template linked here](#).
- Bylaws – only required if amended
- Mission Statement – only required if amended
- Past Year’s Annual Report - This can be a bullet list of activities conducted in the subject year, with some commentary as to the success of each activity (i.e., number of newsletters published; number of trainings held and number of members and nonmembers that participated; number of teleconferences and level of participation; Board and other meetings, etc.). This may serve, in part, as a list of benefits provided to members in the subject year.
- Current Officers and Directors list, including title, phone number and email address.
- Current Year’s Annual Plan - This can be as simple as a bullet list of planned activities for the upcoming year, with a heading entitled <chapter name> <year> Annual Plan.
- Conflict of Interest Policy – only required if amended
- Whistleblower Policy – only required if amended
- Document Retention and Destruction Policy – suggest edits to allow for digital copies

## **Membership Database**

SQA maintains the membership database for all Chapters. This database is integrated with the SQA membership database to allow SQA and Chapter members to maintain their information in one system. The database includes current Chapter members, nonmembers, and other contacts in the Chapter region.

The following information is maintained for each individual:

- Contact information
- Contact demographics (age, gender identity, position, etc.)
- Members interest in any elected chapter position (if requested)
- Years of experience
- Regulatory responsibility and areas of expertise
- SQA/Chapter membership status
- Certifications/Registration
- Trainings and Conferences attended through SQA and/or Chapter
- Groups or Committee membership through SQA and/or Chapter

To ensure that each Chapter has the most up to date list of members, each Board member has access to the Board dashboard that includes a variety of report features and statistics, including the following:

- Number of current paid members
- Number of paid members for prior year
- Graph of Chapter Member counts by year
- Contact information for all paid and unpaid members
- List of any new members since previous report

If you have specific information you would like included on the Board dashboard, please email [chapters@sqa.org](mailto:chapters@sqa.org).

## **Membership Dues**

Chapter membership dues are collected by SQA HQ and recorded in the membership database. The associated services provided to the Chapters are as follows:

- Distribute dues invoices to all Chapter members
  - Dues invoices will be sent to Chapter members via email
- Offer Chapter membership on SQA dues invoices to SQA members in region who are not currently Chapter members
- Provide an online dues payment option
  - This payment option is available for both renewing members and new members
  - Payments can also be sent via fax, email or mail.
- Process dues payments (payments may be made by check or credit card)
- Update all membership contact information
- Distribute receipts upon payment
- Send out reminder notifications to all unpaid members
- Maintain dues payment history
- Process new membership applications:
  - Add contact information to member database
  - Process according to Chapter review procedure
  - Collect dues payment
  - Notify new member of application status
  - Indicate new members on the monthly membership list that is emailed to Chapters

SQA can fulfill additional membership needs upon request. For inquiries about additional services and fees please email [chapters@sqa.org](mailto:chapters@sqa.org).

## **Communication and Social Media Services**

Upon request, HQ can distribute communications and announcements to Chapter members via email.

### **Email Communications:**

- If the chapter would like an email sent out to members, please follow the below steps:
  - Send the email to [chapters@sqa.org](mailto:chapters@sqa.org) at least 72 hours prior to the date you would like the mailing sent (include the content of the email). Please note that initial event emails require four weeks' notice.
  - Include the date on which you want the email to be sent
  - Specify the group you would like the mailing sent to:
    - Your Chapter Members
    - SQA Members
    - All Contacts in your Chapter Region
    - All Other Chapter Members
    - All Nonmembers
    - All of the Above
- Emails commonly sent by Chapters:
  - Newsletters
  - Election ballots
  - Surveys
  - Teleconference information for upcoming conference calls
  - General Chapter updates

### **Social Media:**

- SQA Membership, Marketing, and Social Media Director supports Regional Chapters as follows:
  - Chapters provide content to post on SQA LinkedIn page (1-2 posts per month) to help chapters with awareness building and find and retain members; will leverage existing followers
- SQA available to hold one brainstorming session per year with each Regional Chapter Board and determine best local issues, topics, outlets to scan for content
  - Determine goals and objectives
  - Create a “key-issues” search list for chapter to leverage
  - Provide action items for the Regional Chapter to implement
  - SQA will be available for counsel and “sounding board” for regional chapter on ideas/questions

## **Meeting Services**

The following meeting services are provided by SQA HQ to the Chapter. SQA needs **at least 4 weeks' notice** of an event before the initial communication goes out to members to allow time to set up registration and market the event appropriately.

1. Provide online event registration
  - a) Linked to SQA and Chapter website
2. Distribute meeting announcements via email to specified mailing list
3. Process meeting registrations (as needed)
  - a) Record registration information in member database
  - b) Collect registration fees (credit card or check payments)
4. Distribute registration confirmation/receipts via email
5. Provide registration list to Chapter designee
6. Grade event in Learning Management System and distribute emails notifying participants when certificates are available

To set up a Chapter meeting registration, please complete the [online form](#).

## **Procedure for Requesting FDA Regulatory Speakers**

SQA requests that Chapters follow the procedure below to request speakers from the U.S. Food and Drug Administration due to the frequency of requests for FDA speakers. SQA is happy to assist with requests for speakers from the U.S. EPA, MHRA, Health Canada, EMA, and other agencies, but the form below is not required.

- 1) The Presenter/Session Chair shall develop an agenda and determine regulatory needs for the session/workshop.
- 2) The Presenter/Session Chair shall contact SQA HQ with requests for FDA regulatory speakers. FDA requests shall be submitted using the [online form](#).
- 3) SQA shall review the speaker request information to determine that there is no duplication of contacts with regulators and coordinate the requests (i.e., are there similar requests from more than one group at the same time?). If there are duplicate requests, the request that was received first will receive priority, but the size/nature of the event will also be taken into consideration.
- 4) Once all the appropriate information has been gathered and reviewed, HQ will make formal requests on behalf of the requestor.
- 5) As soon as a speaker has been confirmed by the agency, HQ shall notify the requestor and distribute a formal confirmation directly to the appropriate regulatory speaker with a copy to the requestor.
- 6) From that point forward the requestor shall handle all interactions with the speaker (i.e., meeting details, presentation topics, etc.).

If you have any questions regarding this process, please contact SQA Headquarters.

## **Election/Balloting Services**

SQA provides electronic balloting services to the Chapters to use for annual Board elections and Bylaw amendment votes.

Ballot information is distributed via email to Chapter members. The email includes a unique link to the ballot. The votes are anonymous and cannot be linked to email addresses.

HQ uses the following method of distribution to ensure that all members receive the ballot information:

- 1) Ballot email including link to vote is sent to all members directly from survey program (including 3 reminders sent to those who have not responded).
- 2) Ballot notice sent via email to all Chapter members from mass emailing program with instructions to contact HQ if email with ballot link was not received (including 2 reminders). This program uses a different IP address for distributing the notice, so it potentially reaches some people who did not receive the initial email notice.
- 3) Election information is posted to the Chapter website with instructions for contacting HQ if a ballot is not received.

After the election closes, the results are automatically tabulated and sent to the Chapter Nominations contact for reporting.

To arrange for a Chapter balloting, please forward the following information to [chapters@sqa.org](mailto:chapters@sqa.org):

- 1) Slate of Candidates
- 2) Candidate Biographies (formatted as desired)
- 3) Bylaw Amendments (if appropriate)
- 4) Date for election to start
- 5) Closing date for election

***Please allow at least four business days for HQ to process your request and distribute the ballots. Bylaws elections may take additional time to process and distribute ballots.***

For inquiries about balloting services, please email Chapter Liaison at [chapters@sqa.org](mailto:chapters@sqa.org).

## **Archives**

Chapters have the option of storing electronic and/or hardcopy Chapter documents with SQA Headquarters. If the Chapter requests physical files/materials returned to them, applicable shipping costs will be managed by the Chapter.

### **Electronic Archiving:**

- SQA can act as a repository for electronic Chapter files.
- How to send electronic documents:
  - If you only have a few documents you wish to have stored, you can email them to Chapter Liaison at [chapters@sqa.org](mailto:chapters@sqa.org).
  - If your document size is too large to be sent through email, you may share via WeTransfer, Dropbox, or external hard drive.

### **Physical Archiving:**

- SQA Headquarters can store physical documents/materials in our secure storage space.
- How to send hard copy documents:
  - Email Chapter Liaison at [chapters@sqa.org](mailto:chapters@sqa.org). In your email, please disclose the expected delivery date and an inventory list of all documents being sent to SQA HQ along with the number and size of packages.
  - Mail your documents to the address listed below.

**All electronic and physical documents can be sent to the below address:**

**SQA Headquarters  
Attn: Chapter Services  
820 E. High Street, Suite A  
Charlottesville, VA 22902 USA  
Email: [chapters@sqa.org](mailto:chapters@sqa.org)**

## Webinar Services

Chapters are welcome to use the webinar service through SQA (Zoom Meetings or Webinars). This service allows presentations for up to 1,000 participants over the web.

Participants must have access to the internet to participate in the service. There is no limit to the number of times that a chapter may use this service.

Please use this [Chapter Event Request Form](#) to submit a webinar request at least four weeks prior to the requested date of the webinar. Below is the information needed to set up a webinar for your chapter:

- Contact information of the webinar coordinator
- Title and description of the webinar
- Webinar Type:
  - Broadcast – Only the speaker/panelists will speak. All participants will be muted unless they raise their hand. (Zoom Webinar)
  - Interactive – All participants can communicate. (Zoom Meeting)
- Preferred Date and Time – Please include at least one alternative date in case there is a scheduling conflict.
- Indicate whether you would like a practice session prior to the webinar
  - This is advised for those who have never led a webinar

**To set up a webinar, please complete the online [Chapter Event Request Form](#).**

## **Survey Tools**

SQA provides an online tool for Chapters to use in surveying their membership.

Survey information is distributed via email to Chapter members or a designated distribution list. If the survey is being distributed outside the Chapter membership to SQA contacts, SQA Board approval is required. The email includes a link to the survey. The survey results are anonymous and cannot be linked to passwords or email addresses.

HQ uses the following method of distribution to ensure that all members receive the ballot information:

- 1) Survey email including link to survey is sent to all members directly from survey program (including reminders sent periodically to those who have not responded).
- 2) Survey information is posted to the Chapter website with instructions for contacting HQ if original survey email is not received.

After the survey closes, the results are automatically tabulated and sent to the Chapter contact for reporting.

To arrange for a Chapter online survey, please forward the following information to [chapters@sqa.org](mailto:chapters@sqa.org):

- 1) Survey questions
- 2) Date for survey to start
- 3) Closing date for survey
- 4) Survey announcement text to send to members

***Please allow at least five business days for HQ to process your request and distribute the survey.***

For inquiries about survey services, please email [chapters@sqa.org](mailto:chapters@sqa.org).

## **Website Maintenance**

As a service to the Chapters, SQA provides website content maintenance. Maintenance includes regular postings, content updates, document uploads, etc.

Access to the Chapter web server is required to make content changes. A Chapter representative works with SQA HQ and provides the necessary updates to the Chapter website.

***Please allow at least three business days for HQ to process your request and update the website.***

Full website redesign services are also available to the Chapters at an hourly rate. For inquiries about website maintenance, please email the Chapter Liaison at [chapters@sqa.org](mailto:chapters@sqa.org).

### **Annual Review and 2026 Service Agreement**

If concerns arise at any time regarding staff performance/timeliness of services, Chapters are asked to contact the SQA Executive Director at [sqa@sqa.org](mailto:sqa@sqa.org). Each Chapter President will receive a performance evaluation near the end of the year to provide feedback to SQA Headquarters on staff support. These evaluation results will be shared with the SQA Board of Directors and the Regional Chapter Presidents' Committee.

In exchange for the services included in this manual (which are only provided to North American Chapters), SQA requires that Chapters pay SQA an annual fee in U.S. Dollars (USD) based on the net assets of the Chapter at the prior year's end. The required fee helps offset the costs of providing SQA HQ staff, payment of credit card fees, and the cost of software to support the Chapters' activities. SQA will bill each Chapter for this payment by the end of January, and the payment is due on 28 February. Please see the breakdown below for the calculation of net assets.

Chapter Net Assets = Total Account Balance – (Designated Funds + Allowed Operating Reserve)

- Designated Funds include funds already appropriated for obligations as set forth in the Chapter's Operating Guidelines. These typically include programs such as scholarships or grants.
- The Allowed Operating Reserve is calculated as Total Expenses for the most recent three years x 0.17\* for an estimated reserve of 6-months.

$$\text{*Calc: } \frac{(\text{Yr1} + \text{Yr2} + \text{Yr3}) \times 6 \text{ months}}{3 \text{ yrs} \times 12 \text{ months/yr}}$$

No Chapter will be required to pay a fee that exceeds 50% of the total income received through its membership fees in the preceding year.

If this agreement is not signed by a Chapter by 31 January, that Chapter will not receive services from SQA HQ until signed. This agreement shall be reviewed and signed annually by the SQA Executive Director and the Chapter President or their designee as approved by the Chapter Board. If a Chapter has not paid their annual fee by 15 March, services will cease until the payment is received. The signatures below represent acceptance of the entire agreement and fee structure.

<b>Chapter Net Assets Prior Year End*</b>	<b>Annual Fee Payable to SQA*</b>
\$0-\$4,999	\$0/year
\$5,000-\$15,000	\$500/year
\$15,001-\$25,000	\$1,000/year
\$25,001-\$35,000	\$1,500/year
\$35,001-\$45,000	\$2,000/year
\$45,001+	\$2,500/year

\*USD

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 President  
 Chapter  
 Date:

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 Alison Cockrell, CAE  
 Executive Director, SQA  
 Date: