

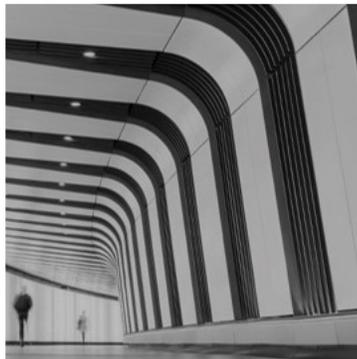
smps[®]

chapter
management
manual



**FINANCE &
ADMINISTRATION**

2020-21



SMPS MISSION

To advocate for, educate, and connect leaders in the building industry.

SMPS VISION

Business Transformed through Marketing Leadership.

Our vision is for firms to execute marketing principles (research, strategy, branding, communications) to drive business decisions and pursue work that aligns with their brand, which will result in profitable operations and a respected market position.

What does “business transformed” mean?

- Being able to clearly define and communicate what sets your firm apart
- Understanding the important balance between marketing and business development
- Helping our members anticipate and navigate the trends and challenges on the horizon
- Operating your business like it's not business as usual

SMPS DEI PHILOSOPHY & POLICY

SMPS recognizes, respects, and values the dignity of all people. We are united in our stance against all forms of injustice and inequity. SMPS commits to actively champion diversity, equity, and inclusion (DEI) within our organization, the firms we represent, the communities we serve, and the architecture/engineering/construction (A/E/C) industries. We are intentionally working to increase participation in our organization and the A/E/C industries by underrepresented groups; advocate for recruitment and retention of professionals of all backgrounds by creating inclusive and welcoming environments; and promote equality and opportunities for advancement in the Society and industry overall. Together, we can transform our businesses, enhance membership experiences, and influence change in our communities.

We recognize that our diversity is reflected by our different people and firms. We believe our varying ethnicities, cultures, genders, sexual orientations, ages, levels of experiences, physical abilities, and other differences benefit us as individuals and as an organization. In SMPS, we will organize and promote programs and activities that espouse our beliefs and increase awareness, understanding, recruitment, and participation of diverse persons and firms.

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FINANCE & ADMINISTRATION

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TABLE OF CONTENTS

Non-Profit Status and Tax Exemption	
Domestic	1
Canada	2
Disclosure of Non-Deductibility.....	2
Unrelated Business Income Tax	2
State and Local Taxes.....	3
Chapter Employees and Managers	3
Annual Reports.....	4
Chapter Financial Support	
Shared Dues.....	5
Insurance	5
Financial Reviews.....	5
Chapter Leadership Symposium.....	5
Team Discounts	5
Board and Staff Attendance	5
Regional Conferences.....	5
Insurance	
General Liability	6
Insurance Certificates.....	7
Directors and Officers Liability Insurance.....	7
Special Events.....	7
Insured’s Duties.....	8
Financial Management.....	8
Federal Employer Identification Number	9
Bookkeeping Procedures	10
Surplus and Reserves.....	10
SMPS HQ Staff	11

SAMPLES, RESOURCES, AND FORMS

All sample documents, resources, and forms referenced, may be found in the library of the MySMPS All Chapter Leaders Community, in the Chapter Manual Folder. Documents also found in the MySMPS Chapter Treasurers Community.

Samples, resources, and forms in the Finance and Administration folder:

- SMPS Treasurers Toolkit
- Chapter Financial Statement Sample
- Chapter EIN Numbers
- 990N Guide for Chapters
- 990EZ Guide for Chapters
- Financial Report Form
- Regional Conference Financial Report Form
- Certificate of Insurance Request Form
- Records Retention Schedule

INTRODUCTION

This section will walk chapter leaders through the financial management and administrative functions of running an SMPS chapter. For chapter treasurers specifically, SMPS HQ, with the help of several key chapter leaders, developed a toolkit as a reference guide for key areas of finance. The toolkit serves as a supplement to this section of the manual. It is available in the MySMPS All Chapter Leaders Community and can be requested from HQ.

NON-PROFIT STATUS AND TAX EXEMPTION

DOMESTIC

Domestic SMPS chapters qualify as tax-exempt corporations under Section 501(c)(6) of the Internal Revenue Code because they are membership organizations operated primarily to promote the common business interests of professional services marketers.

SMPS HQ maintains a group tax exemption with the IRS for all chapters. Even though your chapter is generally exempt from income tax, all chapters are still required to file an annual information return Form 990 with the IRS; and in many cases your state will have a similar requirement.

- If your chapter has gross receipts up to \$50,000, you are required to electronically file the Form 990N.
- If your gross receipts are between \$50,001 and \$200,000, you must file Form 990EZ.
- If your gross receipts exceed \$200,000, you must file the regular Form 990
- **The filing due date based on our fiscal year-end is January 15th annually**

The 990 enables the IRS to determine whether the chapter continues to qualify for exempt status based on its operating activities. Requirements for information returns will vary from state to state. Contact your state to determine its requirements.

Take your filing obligation seriously! Small chapters who fail to file the electronic 990N will forfeit their exempt status, For the larger chapters filing 990EZ returns, there is a penalty of \$20 per day for late filing, up to a maximum of \$10,000, and the IRS really will assess this penalty against your chapter if your return is not filed on time. You may request an exemption of time to file but that request must be made by the filing deadline.

SPECIAL NOTE

As a 501(c)(6), tax exemption applies ONLY to federal and state income taxes. Most SMPS chapters are NOT exempt from state and local sales taxes, although at least one state (Missouri) does extend the exemption to sales taxes by separate application to the state. Each chapter is legally required to maintain appropriate financial records and to file returns with all taxing authorities that have jurisdiction over the chapter.

DISCLOSURE OF NON-DEDUCTIBILITY

If your annual income exceeds \$100,000, IRS regulations require you to include the following text (in a conspicuous and easily recognizable format) on statements, invoices, or letters soliciting financial support and contributions:

“Although payments and contributions to the (chapter name) Chapter of SMPS are not tax deductible as charitable contributions for federal income tax purposes, they may be deductible as business expenses under other provisions of the Internal Revenue Code.”

Failure to include this statement may subject the chapter to substantial penalties (\$1,000 per day for each day on which a violation is found to have occurred, up to \$10,000 maximum).

CANADA | Resident Corporations: Ontario

All corporations—including non-profit organizations, tax-exempt corporations, and inactive corporations—must file a T2 return for every tax year, even if there is no tax payable. The only exceptions to this rule are tax-exempt Crown corporations, Hutterite colonies, and corporations that were registered charities throughout the year. The filing deadline based on our fiscal year is February 28th annually. You are encouraged to consult with an accountant that has expertise in Canadian tax law.

UNRELATED BUSINESS INCOME TAX (UBIT)

Even though SMPS chapters are generally exempt from federal and state income taxes, a non-profit organization can still be liable for taxes if it has what the IRS calls unrelated business income.

IRS uses three criteria to determine unrelated business income:

1. The revenue must be derived from a trade or business (some activity produced the income as opposed to passive income such as interest, dividends, royalties, etc.).
2. The unrelated business activity must be regularly carried on (not a one-time activity).
3. The activity must be unrelated to the exempt function and is usually one in which other non-exempt businesses may provide the same or similar services.

The most likely source of taxable unrelated business activity for SMPS chapters is sales of advertising (including job bank ads) and rental of membership mailing lists. If your chapter has combined annual income from either or both of these sources of more than \$1,000, you may be subject to UBIT. IRS allows you to deduct the cost of producing taxable income so that you pay taxes only on the net income. (For example, you can deduct from advertising income a percentage of newsletter or directory production costs equal to the percentage of advertising it contains.)

The fact that some activity may result in unrelated business tax does not mean you should not do it. It simply means that you should be aware that there are activities where even non-profits have to pay taxes. It's better to earn some money and keep 70%–80% of it than not to earn anything at all! UBIT must be reported on the IRS form 990T. Check with your accountant or HQ if you have questions about taxable income.

STATE AND LOCAL TAXES

Chapters Are Not Exempt from State and Local Sales Tax

Missouri is the only state that does exempt 501(c)(6) corporations from paying sales tax, but only if they apply to the state for that exemption and meet certain state qualifications. Even though all chapters are non-profit and exempt from federal and state income tax, most are not exempt from state and local sales taxes. This means you must pay sales taxes on events and purchases of supplies, printing, gifts, and other purchases.

Other Annual or Occasional Reporting Requirements

In addition to the chapter's annual corporation report to the Secretary of State and federal and state Informational tax returns described previously in this overview, there are still other reports that must be filed either annually or when certain types of changes occur.

Registered Agent|Registered Office

A common provision of most states' non-profit corporation law requires your chapter to designate a registered agent and a registered office. The registered agent is the individual who will receive official notices from the state government and who should pass them along to the chapter officers. The registered office is usually just the mailing address of the registered agent. The registered agent may be an officer or member of the chapter, a local attorney, or even a company that acts in this capacity for a fee. Usually the registered agent must be listed in the annual corporation report mentioned above, along with the names and addresses of all current officers and directors. Your chapter may be required to file a separate "Statement of Change of Registered Office/Registered Agent" with the state whenever either of these change.

CHAPTER EMPLOYEES AND MANAGERS

Paid Chapter Staff—Employees Versus Independent Consultants

Some chapters engage an individual or company to provide administrative support. This support may include meeting registration management, bookkeeping services, or website maintenance. It is important to define the nature of the business relationship prior to beginning work. If an individual is designated an employee of the chapter, all federal and state payroll withholding and employment tax laws will apply.

Many more chapters utilize independent contractors or companies for administrative support. While payroll withholding and employment tax laws do not apply to independent consultants or companies, some record-keeping and payment reporting may be necessary. Fees paid to program speakers and other individuals may require similar treatment.

Reporting Payments to Non-Employee Consultants (1099 Forms)

As a matter of policy, each vendor that a chapter pays should be required by the chapter to provide an IRS Form W-9 before any payments to that vendor can be processed. The W-9 identifies the vendor's type of business entity. The purpose of the W-9 is to identify possible 1099 vendors.

Form 1099 reporting is required by the IRS for payments in excess of \$600 during any calendar year to any individual or unincorporated business such as a sole proprietorship or a partnership. This includes accountants, chapter administrators, speakers (e.g., keynotes), and providers of management services. Any payments to lawyers are reportable, even if they total less than \$600. Amounts paid as scholarships to students do not need to be reported on a 1099. For the purposes of 1099 reporting, reimbursable expenses such as travel costs are not included.

You can file 1099 forms electronically and have them mailed to your vendors using various IRS approved providers. Here is the link for one provider.

<https://www.efile4biz.com>

The deadline for mailing/efiling forms to individuals you have paid in excess of \$600 for the previous calendar year is January 31. Contact SMPS HQ for more information or assistance if you think you need to prepare 1099 forms.

W-9 Forms

Many companies have adopted a policy of not issuing payments to vendors, including SMPS chapters, unless they have a W-9 form on file. This form serves to identify entities that are eligible to receive the form 1099. Chapters should keep copies of their own completed W-9 form on hand to reply to such requests. Visit the IRS website or contact SMPS HQ to obtain a fillable PDF of the W-9 form for your chapter.

FORM 1099 REPORTING TIMEFRAME

For purposes of this requirement, you need to track payments made during each calendar year (January–December) as opposed to the fiscal year (September–August) that you use for other reporting requirements.

ANNUAL REPORTS

Chapters are required to submit an annual financial report to SMPS HQ. This form provides HQ with data needed to maintain your chapter's tax-exempt status, monitor your IRS reporting, and it provides information used to prepare and track statistics on chapter operations. You can find the most recent form in the [MySMPS All Chapter Leaders Community library](#).

The chapter financial report is due to SMPS HQ by September 30 each year. Failure to submit this report will jeopardize your eligibility to receive payments of membership dues shared with chapters for as long as a full year. There is a similar requirement to submit an annual report on chapter educational programs, also due to SMPS HQ each September 30.

A copy of your annual information return to IRS, Form 990, 990N, or 990EZ, must also be forwarded to SMPS HQ upon completion.

CHAPTER FINANCIAL SUPPORT

Shared Dues for New Members

Each new member of SMPS pays a one-time origination fee of \$50 in addition to the annual dues. This amount is split equally between chapters and SMPS. Chapters receive \$32 for each new member of SMPS affiliated with the chapter.

Shared Dues for Renewing Members

Currently, chapters receive \$29 of the annual dues paid by each member affiliated with the chapter who renew their membership.

Insurance

SMPS pays premiums to provide general liability coverage for chapters, and director and officer liability for elected leaders. More information about insurance coverage is provided in the next section of this overview.

Financial Reviews

SMPS HQ performs financial reviews of select chapters on an annual basis in an ongoing effort to support the financial health of our organizations. Chapters will be notified in advance when selected for a review to allow time to adequately coordinate the review with HQ staff.

Chapter Leadership Symposium and Attendance Stipend

Each April, we host a two-day leadership training, best practices, and networking session for designated chapter leaders. In addition to paying for program costs and meals, we provide a \$300 stipend for each attending participant to help defray the cost of travel and lodging at that session.

Chapter Team Discounts for Conference Registrations

Each chapter has the opportunity to designate up to five recipients for a discounted registration fee for the annual conference.

Board and Staff Attendance at Chapter Meetings and Events

Members of the board of directors and some of the HQ staff frequently travel to and participate in chapter events as speakers and presenters, facilitators, instructors and in other capacities.

Support of Regional Conferences

There has been an increase in the number of regional conferences conducted jointly by two or more neighboring chapters. SMPS has been providing a \$1,000 sponsorship, in addition to other substantial support of these conferences including help in marketing the event, staff and SMPS board attendance, and promotional items.

In addition to this direct financial support of chapter activities, during the past year the HQ staff has recorded a combined total of over 3,000 hours of staff support to chapters, the equivalent of one and one-half full-time employees, assisting chapters with a variety of services.

This staff support has included working with local groups to start up new chapters, attending chapter meetings and events, assistance with website development, educational programs, guidance on bylaws, governance, financial and tax matters, planning and conducting the annual Presidents' Leadership Symposium, and professional assistance with a host of other questions and chapter needs.

INSURANCE

SMPS chapters have three major categories of insurance needs: general liability insurance, directors and officers liability insurance, and special events insurance. These three categories are summarized in this section. The summary explains the significant elements of the SMPS liability portfolio—who is covered, what is covered, and the limits of coverage.

The summary below was prepared by Gallagher, the agency retained by SMPS for insurance matters. The purpose of this summary is to provide only a general overview of coverage information. In the event of any conflict, omission, and/or misstatement in the summary, the actual policies currently in force will always control.

General Liability Insurance

Claims involving bodily injury or property damage are covered under the general liability policy maintained for chapters by the Society and coverage for this exposure extends to all chapters in good standing. The limit of liability is \$1,000,000 per occurrence and \$2,000,000 in the aggregate for all occurrences. An umbrella policy provides an additional \$2,000,000 of insurance protection should a claim exceed the limits of the basic policy. Although claims under the general liability policy are rare, chapters should not be without this important coverage.

The general liability insurance protects chapters when they host or sponsor educational meetings, seminars, luncheons, receptions, chapter meetings, networking events, and social functions (refer to the section below for a discussion of special events insurance). This liability protection does not include “office premises” coverage for any chapter that has its own offices.

This liability protection includes “host liquor liability” so your chapter is covered for an event at which alcohol is served, but it is your responsibility to be certain that members and guests drink responsibly. You must be careful not to serve minors, not to serve people who appear to be intoxicated and to cut off anyone who becomes that way. That’s pretty much how bars and restaurants operate. You’re expected to do the same. Whenever possible it is best to use a catering service or hotel staff to actually provide liquor service and to obtain a Certificate of Insurance from the vendor providing and serving the liquor.

Insurance Certificates

Often restaurants, hotels, and meeting facilities will require evidence of general liability insurance, usually a “certificate of insurance,” and in some cases may seek to be named as an additional insured on the chapter’s policy. This is a routine request and there is no charge for a certificate. If you need to obtain an insurance certificate, complete the Insurance Certificate Request Form which can be found in the chapter leaders community library on MySMPS.org and fax it to our insurance agency, Gallagher, at 301.795.6610. Questions can be directed to Julia Van De Wille at Gallagher at 301.917.6546 or Julia_VanDeWille@ajg.com.

Directors & Officers Liability Insurance Policy

SMPS also provides directors and officers (D&O) liability insurance for all chapters in good standing. The policy is specifically tailored to the needs of not-for-profit organizations such as ours. The limit of liability is \$1,000,000 with a deductible of \$2,500.

Notwithstanding the protection against personal liability provided by the corporate form of organization, there are conceivable circumstances under which damages may be sought from chapter directors and officers for their actions in their capacity as directors or officers as well as for actions of the board. The directors and officers liability insurance policy helps protect the individual officer or director from personal liability. Like the directors and officers, the chapter itself is also an insured under the policy. The D&O liability policy protects against claims involving breaches of administrative management. Typical sources of claims involving 501(c) organizations include adverse employment actions, libel and slander, invasion of privacy, and copyright infringement. In the unlikely event that such action is taken, the policy pays the cost of defending officers and directors and any damages negotiated or awarded, up to a total of \$1 million, after payment of a \$2,500 deductible by the chapter.

Special Events Insurance

The SMPS general liability insurance covers a wide range of chapter activities; however, it does not provide coverage for certain special events. Activities that require extraordinary exertion, athletic competition, functions held on boats, or that are held in unusual circumstances will not be covered by the standard general liability policy. Chapters may purchase special events coverage to supplement the general liability provided by the Society. The need for special events insurance should be assessed for any activity or meeting that extends beyond “normal” chapter business. Examples of special events include but are not limited to:

- golf, tennis, or softball tournaments
- ski, boat, or float trips
- group bus rides
- meetings or receptions aboard boats
- regional conferences
- fun runs or marathons regardless of distance

For specific information about whether a particular event may require special events insurance, consult our Gallagher insurance agents: Abigail Furgal at Abigail_Furgal@ajg.com or Ruth Spaid at Ruth_Spaid@ajg.com, or contact SMPS HQ at 703.549.6117.

When reaching out to our Gallagher insurance agents, note that you are a chartered chapter of the policy holder: The Society for Marketing Professional Services (SMPS), based in Alexandria, VA.

Recommended Provider for Special Events Coverage

Cost of special events coverage will vary according to nature of event, number of participants, etc., probably in the \$300–\$500 range for most events.

SMPS’s Primary Agents

(Contact them if you have difficulty locating a source for coverage or need other help. When reaching out to our Gallagher insurance agents, note that you are a chartered chapter of the policy holder: The Society for Marketing Professional Services (SMPS), based in Alexandria, VA.)

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Insured’s Duties in the Event of a Claim

Each of the policies referenced above imposes specific duties (contractual obligations) on the insured in the event of a claim. When practicable, all insured—directors, officers, trustees, employees—have the responsibility of disclosing their knowledge of a claim or of circumstances of which they are aware that might reasonably be expected to lead to a claim. If you become aware of a claim, or even the probability that a claim may be filed against the chapter or against one of more of the officers and directors, please notify the HQ staff immediately so that the incident can be reported to our insurance agency and the facts of the incident can be recorded in the detail needed for handling the claim.

CHAPTER FINANCIAL MANAGEMENT

Chapter Fiscal Year

Each chapter’s fiscal year must coincide with the SMPS fiscal year: September 1–August 31. This is your chapter’s operating year, when annual terms of officers and directors begin and end, and it is also your budget year and annual accounting period.

Chapter Treasurer

Each chapter should have an elected treasurer at all times. Smaller chapters sometimes combine the duties of both secretary and treasurer into a single office (secretary/treasurer), but it is important to have one officer responsible for chapter finances at all times. Some larger chapters contract for management assistance and often pay an individual or management company to perform some or all of the financial functions of the chapter. Having the outgoing treasurer work with the treasurer elect to ensure a smooth transition is a recommended practice.

Chapter Financial Policies and Procedures

Most sound organizations have a set of policies and procedures for accounting and financial reporting. This is particularly important for chapters, as leadership changes frequently. Such a framework will help to provide consistency of practice regardless of who is performing financial functions. Many chapters have such procedures in place. We urge those that do not to make it a priority to adopt a policy. While some policies should apply to all chapters, others might not translate because of chapter size or other mitigating factors. SMPS HQ has a sample set of procedures that can be used as a template for individual chapters.

Professional Accounting Assistance

It is the primary function of the treasurer to ensure that sound accounting services are provided to the chapter. It would be prudent for the treasurer to have an adequate working knowledge of accounting procedures; especially if he or she assumes responsibility for performing the accounting and reporting function. SMPS HQ is always available to answer accounting and finance related questions as they arise within each chapter. Some chapters, larger ones in particular, will seek outside guidance for financial reporting/auditing needs. Professional financial services are recommended, if affordable. The following are tips for choosing an outside accountant for your chapter:

- Choose a local manager or management/bookkeeping service that specializes in work for non-profit organizations.
- Your accountant should be familiar with state and local laws and have non-profit experience. This is especially important to your chapter. Ask for references from organizations similar in size and status.
- Your accountant should understand that, as a very small corporation, you do not need complex financial reports and must be willing to work with you to keep costs down.
- You do not necessarily need certified statements (financial statements with the accountant's name on them). Basically, all you want is someone to take care of your legal reporting requirements and to help you when bookkeeping questions arise.

FEDERAL EMPLOYER IDENTIFICATION NUMBER (EIN)

Your chapter's federal Employer Identification Number (EIN) is the number that identifies your chapter to the IRS and others—much like your personal social security number. (A listing of chapter EIN numbers can be found in the chapter leaders community library.) Your EIN is used to open a bank account, on federal and state tax returns, W-9 and 1099 forms, and elsewhere. Members' companies will often require that you furnish this number before they will issue checks to your chapter. They may request that you provide this information on a W-9 form and you are required to respond to their request.

BOOKKEEPING PROCEDURES

It is important to keep accurate financial records and to maintain consistency of information from year to year. You should choose a bookkeeping system that is relatively easy to understand and use and that can be transferred easily from one treasurer to the next. There are excellent off-the-shelf software programs now available to handle your bookkeeping processes. “QuickBooks” is used by SMPS HQ and is recommended to all chapters who do their own bookkeeping and accounting, regardless of the chapter’s size.

All bookkeeping and accounting procedures use a “chart of accounts” to classify and track income, expenses and bank account balances. This is a listing of asset, liability, income and expense accounts, numbered for ease of data entry, which are used to record each financial transaction. This chart of accounts conforms to the Form 990 reporting categories to make it easier for you or your accountant to complete those returns. Not all chapters will need all categories and accounts. Larger chapters will usually need a more detailed breakdown of accounts than smaller chapters. The account chart is intended as a guide to organizing your bookkeeping and accounting system. Your chapter may want to add additional accounts for other activities not included in the model or to provide for more detailed reporting of the activities suggested.

Copies should be made of all checks deposited and kept with a copy of the deposit slip. All invoices paid by the chapter should be marked with the check number and check date and maintained in a file. All deposits and paid invoices should be kept for a period of three years. Financial statements and journals should be kept for seven years.

SURPLUS AND RESERVES

All chapters should maintain and grow a cash reserve during good times to help them continue their activities and programs during tough times. Just as we all try to keep savings available for emergencies or save up for a special purchase, the chapter needs a “nest egg” just as much as an individual does. Chapters need to be able to cover expenses if a program fails to generate enough income to offset its cost, to supplement income if there is a decline in membership due to an economic downturn, and to fund special projects that may exceed the resources available in a single year.

Even though SMPS chapters are “non-profit” corporations, this does not mean that chapters cannot make money on their operations. Non-profit really means that no individuals can profit by receiving distributions of income from chapter activities. As long as any surplus income is not paid to individual officers or members, chapters can earn profits and accumulate reserve funds without incurring penalties or jeopardizing their tax exempt status.

The amount of your chapter’s reserve fund can vary greatly depending upon chapter size or plans for any long term special projects or programs, and upon the chapter’s ability to generate surplus funds from its regular programs to add to its reserves. A good long-range target for your reserve fund balance is between 30% and 50% of your annual budget, but proceed slowly so you do not charge your current members unreasonably to provide for the possible needs of future members. Even a three-month equivalent is a very comfortable reserve for many SMPS chapters.

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