ISC2 Chartering Chapter Guidelines

How to Start an ISC2 Chapter

Table of Contents

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Chapter Program Overview

Thank you for your interest in starting a new ISC2 Chapter in your local area! ISC2 aims to strengthen the information security professional community through collaboration, education, networking, and mentoring. With over 140 chapters and growing, the program provides ISC2 members and non-members alike an opportunity to share knowledge, grow professionally, raise security awareness and advance information security in local communities around the world.

The Vision and Mission of ISC2

The ISC2 vision of inspiring a safe and secure cyber world expands the ISC2 mission and demonstrates our commitment to supporting and providing members and constituents with credentials, resources, and leadership to address cyber, information, software and infrastructure security and deliver value to society. We take pride in our reputation built on trust, integrity, and professionalism. And we're proud of our membership – an elite network of over 160,000 certified industry professionals worldwide.

Chapter Program Goals

The strategic objective for the Chapter Program is to engage ISC2 Chapters as vital, relevant contributors to delivering on the ISC2 mission. The key goals for the program are to develop strategies to engage chapters and their members, demonstrate the value of the program to the organization and members, provide enriched opportunities for chapters to engage and retain membership, and improve governance and administration of chapters. Through these strategies, it will:

- Strengthen connections among ISC2 members and between ISC2 and our members
- Enhance the ISC2 member experience and improve value in membership
- Encourage non-ISC2 credentialed professional participation to learn and contribute
- Advocate for the information security profession and ISC2 certifications
- Educate and empower local communities on cyber security awareness and protection
- Mentor aspiring information security professionals
- Provide current and timely educational opportunities and professional resources
- Create a forum for information security professionals to collaborate on projects and develop leadership skills

Connect | Educate | Inspire | Secure

The ISC2 Chapter Program was established to provide cybersecurity professionals to engage in various events and activities to:

- **Connect** like-minded individuals with networking and career opportunities
- **Educate** members on the latest trends and technologies, and preparing for an ISC2 certification
- **Inspire** the next generation of cybersecurity professionals and future leaders
- **Secure** the local community by generating awareness and empowering individuals to protect themselves online

Under each focus area, chapters can offer various activities based on their goals and member's interests:

Connect	Educate	Inspire	Secure
• Professional Networking • Career Development • Job Connections • Knowledge Exchange • Joint Opportunities • Social Outings • Fellowship	• Industry Expert Presentations • Study Groups • Seminars/Workshops • Curriculum Development • Continuing Professional Education (CPEs)	• Mentor Students • Special Interest Groups • Cybersecurity Awareness • Advocacy for the Profession • Leadership Development • Professional Development • Fundraising (Scholarships)	• Teaching Others to be Safe Online (children and seniors) • Form Partnerships with Public and Private Sector • Collaborate on Cybersecurity Awareness Projects

Benefits of Chapter Membership

Joining an ISC2 Chapter will provide you with the opportunity to network with cybersecurity professionals and give back to the local community by sharing your time, talent, knowledge and experience. Not only will you gain a sense of fellowship with colleagues in your profession, but you will support the vision of inspiring a safe and secure cyber world and nurture the next generation of cybersecurity professionals. Other opportunities consist of:

- Developing leadership skills by serving as a chapter officer, speaking at chapter meetings or special events, and mentoring credential seeking professionals
- Studying with colleagues for ISC2 base and advanced credentials
- Earning CPEs by participating in professional activities
- Participating in co-sponsored events with other industry associations
- Assisting ISC2 initiatives by speaking at industry events, or writing articles for publication
- Participating in local community outreach or public service projects to educate people about cybersecurity

Start a Chapter Near You!

ISC2 encourages members who have the same vision of inspiring a safe and secure cyber world to start a chapter and make an impact in their local communities. It takes time, hard work and dedication, but there are many benefits involved that make it worth the effort.

This document will provide you with an overview of the entire chartering process, as well as step-by-step instructions on how to get started and become an official chapter. As part of the application process to start a chapter, you will need to review and acknowledge these Guidelines before submitting your application online.

Please feel free to contact us with any questions at chapters@isc2.org.

Eligibility Requirements
To be eligible to start a chapter, you will need to meet the following requirements:

- Be an ISC2 member in good standing for a minimum of three years
- Be a resident of the area in which you plan to start a chapter for at least one year
- Have proven leadership experience in a professional setting
- Not currently serving as an officer of another security chapter organization
- No previous convictions of criminal activity or conduct

Below is an explanation of each:

- **Membership Experience -** Starting a chapter places the applicant in a high-profile position in which they become an ambassador for carrying the reputation of ISC2. ISC2 encourages members who understand the requirements for becoming a member and maintaining a certification, who can attest to what it's like to be a member, who abides by the ISC2 Code of Ethics, and believes in the vision and mission of ISC2, to take on the charge of starting a chapter in their local community. To truly understand the value of being an ISC2 member, one should be a member for at least three years in good standing, and complete one renewal cycle.

- **Local Residency –** Applicants must be a resident for at least one year in the proposed chapter territory. It is important that the member is familiar with the area and understands the needs of security professionals in the community. Having connections in the area can also be very helpful in getting established. Members who have heavy travel schedules or live in the area part time should not apply due to the limited time available to commit to developing the foundation of the chapter.

- **Not currently serving as an officer of another chapter organization** - ISC2 requires members who are developing and managing an ISC2 Chapter to focus their efforts on making the chapter successful, and to avoid being distracted with the mission and objectives of leading another similar chapter organization. This also prevents the possibility of biases and preferences. However, ISC2 supports and encourages ISC2 Chapters to work with chapters of other security organizations by producing joint/cobranded events and activities, but requires the leadership be separate. (NOTE: This applies to not only the applicant, but the officer positions of President, Treasurer, Secretary and Membership Chair; and Vice President if position is available in the chapter. This does not apply to directors and committee chairs.)

- **No previous convictions of criminal activity or conduct –** ISC2 presumes its certified members to be of the highest ethical and professional caliber. To that end the organization has standards that candidates must acknowledge as part of being a leader of an ISC2

Chapter. The following activities may impact your eligibility to start an ISC2 Chapter:

- Convicted of a felony, a crime based on dishonesty (felony or misdemeanor involving lying) or a Court Martial in military service or is there a felony charge now pending against you (Omit minor traffic violations and offenses prosecuted in juvenile court.)
- Being involved, or publicly identified, with criminal hackers or hacking
- Revocation of a professional license, certification, membership, or registration, or been censured or disciplined by any professional organization or government agency
- Previously known by any other name, alias, or pseudonym (Omit user identities or screen names with which you were publicly identified, and name changes due to marriage or adoption.)

If any of these activities apply to you, you may not be eligible to start or lead an ISC2 Chapter. If you feel you may still be eligible, please contact legal@isc2.org to discuss your situation and receive clearance of eligibility. ISC2 members are advised to resolve any potential eligibility problems prior to applying to start an ISC2 Chapter.

NOTE: ISC2 holds the right to audit the member's professional experience or request a criminal background check at our discretion if concerns are raised about the member's credibility and expertise.

Leadership Criteria

Strong leadership skills are key in starting up and running a successful chapter. The criteria in leading an ISC2 Chapter consists of stewardship, intellectual engagement, strategic thinking, team player, communications skills, ethical integrity, and transparency. Applicants should see the value of sharing ideas, interacting, and working with peers to build a network of colleagues and friends along the way.

- In addition, applicants should have previous leadership experience and/or knowledge in, but not limited to:
  - Starting a chapter, user group or other organized network
  - Holding an officer or director-level position within a chapter or organization (recommended two years)
  - Serving in a leadership position in a chapter, user group or other organized network (recommended two years)
  - Managing teams of people through employment or volunteer programs (consisting of five or more people)
  - Possess five years of experience working in a governance capacity

If you meet the criteria to start a chapter, review the next section on the Chapter Application Process which will provide you with details on next steps.

Geographic Area for New ISC2 Chapters

The policy for assigning a geographical area for a new chapter territory is the following:

- An ISC2 member can request to start a new chapter in a geographical area not currently served by an ISC2 Chapter.
- The geographical area city should not overlap with an existing chapter.
- The geographical area covered should be no more than a reasonable travel for a face-to-face meeting. However, the area should be large enough to serve enough people who are interested in cybersecurity and to be active in the chapter (minimum number to start a chapter is 15).
- City, state, regional, country, and multi-country chapters are acceptable and will be considered if the chapter is able to serve members and cybersecurity professionals throughout the entire geographic area. There should be little to no potential for additional chapters forming in the future due to sparsely populated areas with little to no ISC2 members in the geographic area.
- The name of the chapter should reflect the geographic area that is being served, such as the name of the city or the regional area. Nicknames are not acceptable.

Chapter Application Process

There are three phases involved in the process of becoming an official chapter of ISC2. Below is an overview of each phase:

1. **Application Phase** – During this phase, members will submit an application to start a chapter in their desired location during a scheduled timeframe during the year. Open enrollment will take place twice per year, in the beginning and middle of the year [Refer to Start A Chapter page for exact dates]. ISC2 will verify member background information and research details about the specific area of interest. If approved, then a regional chapter review team will evaluate the applications and score them based on specific criteria. If approved, the applicant proceeds to the Chartering phase. If declined, applicants are notified via email.

2. **Chartering Phase** – Approved applicants will receive a start-up kit, which contains important materials to establish the chapter. A chartering chapter orientation will be held via a webinar with other applicants within the region who have been approved to start a chapter. The webinar will be recorded for those who are not able to attend the live version. All applicants must attend in the webinar (live or recorded). This webinar is the first milestone in a series of seven activities to be completed to continue through the chartering process.

   Once the first milestone has been completed, an email announcement will be sent to all local ISC2 members to notify them of a chapter being formed in their area and to contact the applicant if interested in joining the initiative as a charter member. The applicant will need to schedule a start-up meeting with interested members to discuss the mission and goals of the chapter, elect officers and sign the application with at least 15 ISC2 members. The application and meeting minutes are submitted to ISC2.

   Three activities, or goals, are identified in the start-up meeting and implemented throughout the chartering process. Progress reports are submitted to ISC2 upon completion of each activity. Once the chartering group completes the three activities, they will complete legal documentation, and then proceed to the Official phase.

3. **Official Phase** – Once the legal paperwork has been signed off by ISC2, the chartering group becomes an official chapter. The chapter receives an Official Chapter Welcome Kit and an announcement is sent to local ISC2 members about the chapter being newly established.
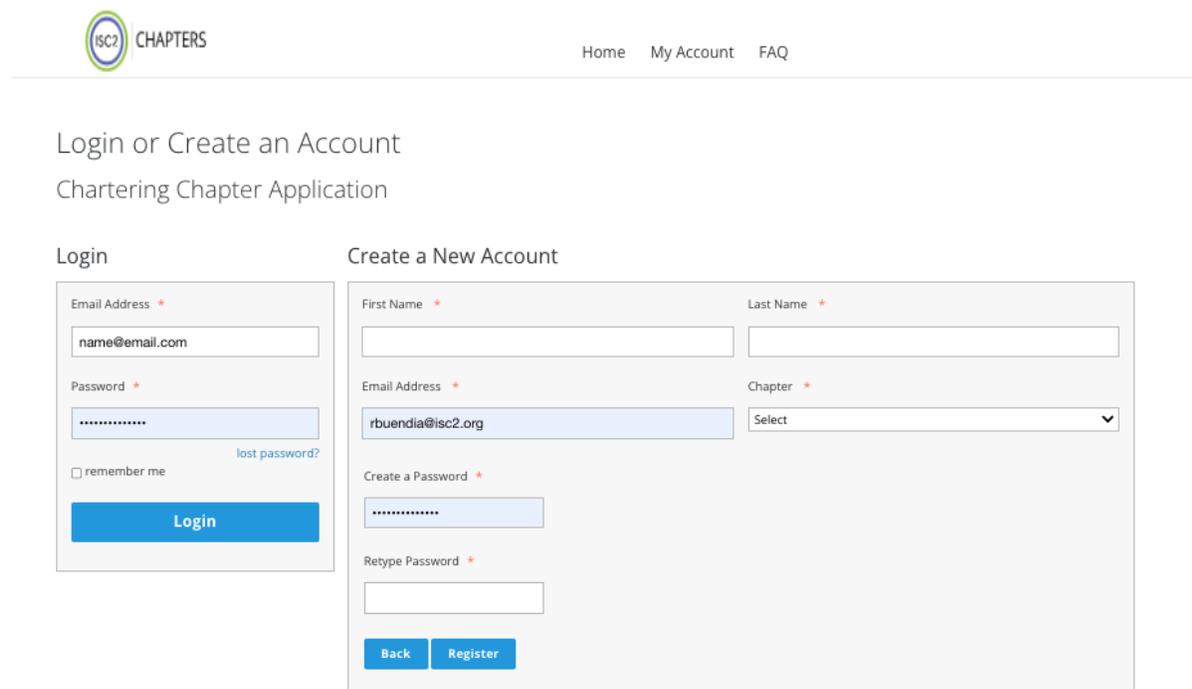
More details about each phase of the Chapter Application Process are explained in the next section.

Application Phase

Before you apply to start an ISC2 Chapter, determine if the area where you are interested in is available. Refer to the ISC2 Chapter Directory to find out if one already exists. If one does exist, then contact the local chapter directly for more information about membership and activities. If a chapter does not exist, then consider working with a group of your professional colleagues in your region to submit an application.

Application Submission
Once you've determined you are eligible and no chapter exists in your desired location, then complete and submit an application via ISC2s Chapter Application Portal. First, you will need to create an account for your proposed chapter in the system with an email address you plan to use for ongoing chapter communications. You will use this system throughout the entire chartering process.

Shown above: ISC2 Chapter Application Portal (powered by Open Water)

Note: If you create an ISC2-specific email address, include the word "chapter" or variation of the word to distinguish your chartering chapter from the ISC2 organization.

Once you've set up an account, you can login with the credentials you just created. Please note that there are specific dates in which an application to start a chapter can be made. Open enrollment dates will be listed on the screen.

After you click "Register", you will enter the Application screen. Here you will be able to begin filling out your Chartering Chapter Application.
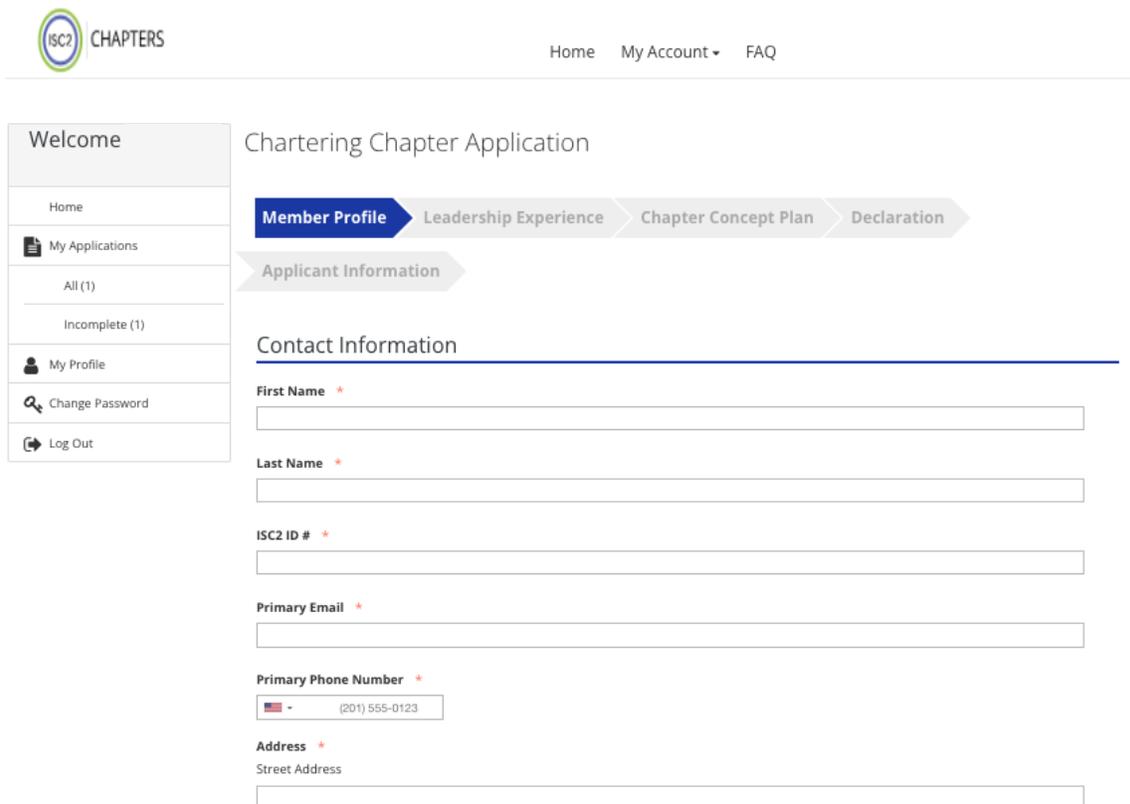
Shown above: ISC2 Chartering Chapter Application powered by Open Water

During the Application phase, you will complete the following sections:

- **Member Profile** – this section requests information about your contact information and, membership affiliation.

- **Leadership Experience** – this section will gather details regarding your prior professional and personal leadership experience and require you to submit your resume or CV.

- **Chapter Concept Plan** – submit a vision and goals, and details of the people working with you to start a chapter in your local community. Questions include details pertaining to your requested location, the purpose and mission of the chapter, areas of focus, the proposed structure, and financial support (if necessary). The concept plan will serve as a guide for developing a more detailed plan later in the process.

- **Declaration** – this section requires that you, as a representative of your group, acknowledge that you've read and agreed to the terms and requirements of the ISC2 Chartering Chapter Guidelines, and affirm to the information you submitted in your application.

Approval Process

Applications received will be thoroughly reviewed and assessed. The focus will be on the value and benefit a local chapter brings to the local community and to ISC2. The team will be looking for a strong, compelling purpose to start a chapter in a particular area, including a well-thought-out concept plan as to the mission, focus and structure of the proposed chapter.

There is a three-step process in which each application is reviewed: **Verification**, **Evaluation** and **Final Decision**.

Verification: Pre-Approval Process

During the Verification Process, ISC2 regional staff will check the applicant's background information to determine the following:

- Has the applicant been a member in good standing for at least three years?
- Has the member lived in current proposed location for at least one year?
- Does the member have leadership experience?
- Is the member a current leader of another security chapter?
- Is there more than one applicant for the proposed location?
- Is there an existing chapter in/nearby the requested territory? If so, how close is the chapter?
- Do the proposed boundaries present any conflict? If yes, why is it a conflict?
- How many members are in the proposed territory?

If the applicant meets all the requirements above, then they will proceed to the Evaluation Phase. If more information is required, ISC2 will notify the applicant and request more details. If no additional details are received, and eligibility criteria is not met, then the application will be declined, and the applicant will be notified via email.

Evaluation: Review and Scoring Process

Once the application has been pre-approved, it is evaluated by ISC2 Chapter Advisory Committee members. The team will review and score applications independently based on the following criteria:

1. **Location** – Is the requested location a viable area to start a chapter? Is the area too large to serve members? Does the proposed chapter name encompass the territory they plan to serve? Are there enough ISC2 members in the area? Is this an area where ISC2 should have a larger presence? Are there any existing ISC2 Chapters nearby? If so, are there any concerns for conflict?

2. **Leadership** – Does the applicant's leadership experience meet expectations for starting and managing an ISC2 Chapter? Based on the applicant's experience reported, would this individual serve as a good leader for the chapter? Are there any concerns?

3. **Motivation** – Does the applicant appear to be interested in benefitting the greater good of the profession, or do they appear to be motivated to benefit themselves? Does the applicant have the time to commit and dedicate to starting the chapter?

4. **Vision** – Does the applicant have a well-developed plan for the chapter? Do they have a solid vision or mission statement? Is there a particular focus for the chapter (i.e. education, networking, service, etc.)? Has the applicant investigated where, when and how often to meet? How far into the future is the proposed plan?

5. **Finances** – Based on the proposed chapter concept plan, does it appear that the chapter will be able to financially support itself? Has the applicant proposed how the chapter would be funded? Will it be able to raise the appropriate funds to support itself? Does it appear that it will have little to no expenses?

Applications will be scored on a "confidence" scale of 1 to 5, with 5 being the highest and 1 being the lowest. The total and average scores are then reviewed and evaluated by the ISC2 Chapter Relations Team.

Final Decision: Decline/Approval Process
Once scores are reviewed and evaluated, the team will make a final decision on the applications. ISC2 may approve or decline any application at its sole discretion.

In the case where multiple applications are submitted for the same location, the applicant with the highest score and feedback will be approved and will take the lead in establishing a chapter in the area. Other applicants will be notified and connected with the approved applicant to help with establishing the chapter.

For applications that have been declined, applicants will be notified via email. The applicant may be eligible to resubmit during the next enrollment period.

Chartering Phase

Once the application has been approved, the applicant enters the Chartering Phase. In this phase, the applicant is responsible for organizing and establishing the chapter, for recruiting members, holding a start-up meeting and elections, developing, and implementing a success plan with chartering members, and submitting progress reports. All of this takes place over a 6–7-month period. Specific dates will be provided upon notice of the application approval.

Chartering Group
Applicants will be assembled into regional chartering "group". Information will be shared among the groups via a virtual orientation initially, and then individuals will be introduced to provide support for one another throughout the chartering process. This will help develop relationships and provide support among other ISC2 members who are going through the process at the same time.

Chapter Start-Up Kit
Chartering groups will receive a packet of materials needed to become an official chapter. The kit includes:

- **ISC2 Official Chapter Handbook** – contains policies and guidelines for managing an Official ISC2 Chapter.

- **Chartering Chapter Logo** – a Chartering Chapter logo is available for use throughout the chartering process. You will receive the Official Chapter logo once your chartering chapter receives its charter.

- **Chapter Application** – to be completed at the chapter's Start-up Meeting with signatures from members who are interested in joining the initiative to start the chapter. These individuals will be considered "charter members". Additional charter members can join throughout the Chartering process until the chapter becomes official.

- **Marketing Templates** – a branded Word document and PowerPoint presentation files will be provided to you to use throughout the chartering process.

- **Success Plan** – a template will be provided to you to develop a plan for your chapter to implement during the chartering phase of the application process.

- **Activity Status Reports** – a sample activity status report form will be provided to you to report on the progress of your chartering chapter.

- **Sample Chapter Bylaws** – a governance document is required to become an official chapter. ISC2 provides sample bylaws template to use, but the chartering chapter may develop its own. This document will need to be submitted to ISC2 before completing the chartering process.

- **Chapter Affiliation Agreement** – to become an official ISC2 Chapter, all chartering groups shall agree to abide by all ISC2 regulations and requirements by signing the ISC2 Chapter Affiliation Agreement.

- **New Chapter Profile Sheet** – this document requests information to be able to set up accounts in ISC2 system and ship the ISC2 Official Chapter Welcome Kit to the appropriate location.

You will also be set up with a **Chapter Group Hub** on the ISC2 Community where you can connect, communicate and collaborate with other chartering members of your group.

Chartering Milestones

Once applicants receive their Chapter Start-up Kit, then they must complete several milestones throughout the chartering process. This probationary period is to ensure that a solid foundation is built before receiving the official charter and to confirm chapters are set up correctly. In addition, these activities will help the group build momentum and remain active.

Below are the seven milestones in which each chartering group is to complete to become an official ISC2 Chapter:

1. **Orientation**
2. **Start-up Meeting & Application**
3. **Success Plan**
4. **Goal/Activity #1**
5. **Goal/Activity #2**
6. **Goal/Activity #3**
7. **Legal Documentation**

Each one of these steps will need to be completed in your Open Water account under the tab **"My Applications".**

Orientation

A Chartering Chapter Orientation will be held via a web conference for all approved applicants within a specific region, to provide guidance and direction as they start the process of forming their chapter. During the webinar, ISC2 regional staff will review rules and requirements for establishing a chapter and address other key areas of the ISC2 Chartering Chapter Guidelines. They will also review the Chapter Start-up Kit and provide various tips and advice to help them get started. At the end of the call, a Q&A session will be held where the applicants can ask questions. Once you've completed the Orientation, enter the date you attended and provide an electronic signature in the ISC2 Chapter Application Portal.

After the Orientation, ISC2 will assign a chapter mentor and send a local outreach email.

- **Chapter Mentors**
  A mentor will be assigned to each chartering chapter as a "go to" resource for advice and guidance throughout the chartering process. The mentor may be a current or former ISC2 Chapter officer or an ISC2 Chapter Advisory Committee member. This person will have previous chapter and/or leadership experience that will be able to share their experience and provide valuable insight.

- **Outreach Email**
  ISC2 will send an email on behalf of the applicant to all ISC2 members located in the requested area to notify them of the formation of the new chapter and invite them to become a charter member. Members will be instructed to contact the chartering chapter for details. Not only does this help with your recruiting efforts, but it ensures all ISC2 members are given the opportunity to get involved at the early stages of the chapter formation. Once you have at least 15 ISC2 members who are interested, then hold a start-up meeting.

Start-up Meeting

Once the applicant can generate enough interest from local members to start the chapter, they will hold a start-up meeting to discuss the mission and goals of the new chapter, elect officers, and sign the application form.

- **Discuss the Mission and Goals**
  Interested members should discuss and determine the mission and goals of the chapter, as well as the areas of focus that the group is interested in, such as professional development, community service, networking, and social activities, etc. The applicant shall review their chapter concept plan with the group and discuss details pertaining to the proposed chapter name, geographical boundaries, meeting location, frequency of meetings, membership fees (to charge or not to charge), legal status, communications, start-up costs, etc.

- **Elect Officers**
  There are four positions required to operate an ISC2 Chapter: President, Treasurer, Secretary and Membership Chair. These positions may only be held by ISC2 credentialed members who do not hold a leadership position in a competing security

organization. These positions should be filled by four different ISC2 members when submitting the ISC2 Chapter Charter Application who fulfill these roles throughout the chartering process.

Please note the following:

- The approved applicant should serve as the President during the chartering process and will be the main point of contact with ISC2 until the chapter receives its charter.

- An ISC2 credentialed member or other security professional who is employed by entities with a conflict, offer a service, or are commercially motivated to promote alternative certifications/training may become a member of a chapter; but **cannot** serve as a chapter officer.

- *A member from another security chapter organization may join as a member of an ISC2 chapter; however, an officer from another chapter organization **cannot** concurrently serve as a required officer of an ISC2 chapter.*

Chapters can define the specific roles for each officer position; however, a basic job description for each one is as follows:

- **President** – responsible for presiding over the business meetings and ensures that all rules and regulations are observed, appoints and serves as a member of all committees, decides tie votes and ensures that all officers faithfully perform their duties.
- **Treasurer** – responsible for keeping an accurate record of all chapter receipts and expenditures. Treasurer shall collect all dues and other monies, depositing in a repository in the name of the chapter.
- **Secretary** – responsible for recording the proceedings of the chapter, writes and conducts the correspondence, as well as prepares reports due to ISC2.
- **Membership Chair** – responsible for promoting the membership growth of the chapter and ensuring new and potential members can take part as easily and smoothly as possible. Also responsible for maintaining membership records to ensure they are accurate and up to date.

Other Positions for Consideration:

- **Vice President** - many chapters create a position of Vice President within the chapter's board. Typically, this is the first person in the presidential line of succession and ascends to the presidency if the president was removed for any reason. This position is not required, but optional. If the chapter chooses to include this position, then the individual must be a member of ISC2.

- **Chairs, Directors, Etc.** - many chapters create other positions within the chapter to support the leadership team. These positions are eligible be held by non-ISC2 members.

- **Past President** – another role to consider in the long term, is adding a "past president" position which will help when transitioning new officers to the board. This position would typically advise the incoming/new President and other officers and Board of Directors and chapter leaders regarding past practices, general operations, and other matters to assist in the smooth running of the chapter.

- **Charter Member (or Founding Member)** – as an original member of the chartering chapter, all members on the final roster will be considered "charter members" once your group becomes an official chapter. The chapter can choose to provide special recognition to its members for this unique designation.

- **Signing the Chapter Application**
  To proceed with the next milestone in the chartering process, the applicant must obtain at least 15 signatures from ISC2 members on the chapter application.

  - An ISC2 member is a professional who holds one or more of the following ISC2 credentials: CAP, CCSP, CISSP, CSSLP, HCISPP and SSCP.
  - ISC2 credentialed members and non-credential holders may join an ISC2 Chapter
  - An ISC2 chapter member who does not hold an ISC2 credential, is not a member of ISC2
  - ISC2 members are *not* automatically enrolled as a chapter member, and are not required to join a local chapter
  - Members can choose to join more than one ISC2 Chapter
  - All ISC2 chapter members are required to abide by the ISC2 Code of Ethics
  - To verify if someone holds an ISC2 certification, visit the ISC2 Certification Verification page

- **Complete and Submit the Application and Meeting Minutes**
  The ISC2 Chapter Application should be completed and signed by the chartering members. Be sure the newly elected officers are listed, as well as any other positions assigned under the Chapter Position section. All materials should be packaged and uploaded to the ISC2 Chapter Application Portal. **ISC2 will not accept incomplete applications.** Keep the original files for your records. ISC2 will review the materials and provide feedback within a specified timeframe (as provided to you in your approval letter).

Chapter Success Plan

Once you've held your start-up meeting and elections, you will work with your team to develop a Success Plan and implement over the next several months. This will be based on the Chapter Concept Plan you submitted when applying to start a chapter, and the feedback received during your start-up meeting. ISC2 will provide a template you can use, or you can develop your own plan. Either way, three activities should be established for your group to accomplish over the next 4-5 months.

Here are some examples of goals your group can work towards:

- Member meeting
- Industry expert presentation
- Community service event
- Increase membership (%)
- Hold a study group

- Develop a policies and procedures manual

Submit Progress Reports

As your group accomplishes each goal, progress reports should be submitted to the Chapter Application Portal. Deadlines will be assigned for each goal and progress will be monitored in the system. All three goals should be accomplished by the end of the chartering period to become an official chapter.

Complete Legal Documentation

To finalize the chartering process and receive your charter, the following items will need to be completed and submitted to ISC2 through the Chapter Application Portal:

- **Chapter Bylaws/Governing Documents**
  Each ISC2 Chapter shall adopt its own bylaws or other governance document for its operations that comply with the ISC2 Chapter Affiliation Agreement. This document serves as the rules by which the chapter operates, such as establishing member dues, types of meetings, election process, officer roles, how to resolve chapter conflict issues, etc. Sample bylaws are provided to chartering chapters to use as a model in establishing its own bylaws. This document can be used, or you can develop your own. Once your governance document (or bylaws) has been drafted and formally adopted by the chapter, you will need to submit a copy (in English) to ISC2 for our records. Sign and scan the information and upload it into the application portal.

- **Chapter Affiliation Agreement**
  This document outlines the framework of your chapter and is legally binding. The agreement should be physically signed by the chapter president and submitted to ISC2 for final authorization. The agreement shall **<u>not</u>** be altered in any way by copying and pasting it into a word processing file. Please print and sign the form as is.

- **New Chapter Profile Sheet**
  Complete this sheet with the location information of your chapter to receive the Official Chapter Welcome Kit, as well as to update your chapter record with any changes that have taken place since the application process first started, and to record all chartering members with ISC2. In addition, this information will be used to register you as an Official CPE Submitter of ISC2.

Once these items have been completed, upload them into the Chapter Application System. The original agreement should be kept on file with the chapter's records. ISC2 will review and authorize the agreement, in which you will receive an official welcome letter and signed copy of the agreement.

Legal Registration – Legal registration is the sole responsibility of the chapter. The chapter is considered independent of ISC2 and not controlled or managed by ISC2 in any way except for the restrictions imposed by ISC2 for the use of its mark, and those stated in the Chapter Affiliation Agreement.

Chapters will need to establish a legal entity in their own name as a "Chapter". While incorporation is not required to form a chapter, depending on local legal requirements to

establish an independent bank account, it will be required to apply for financial startup assistance from ISC2.

ISC2 cannot provide any legal assistance regarding how to set up a chapter entity. Therefore, ISC2 advises all members to seek legal advice in your local jurisdiction on any questions regarding the establishment of a legal entity. If you decide to legally register the chapter with the state or country as a corporation, not-for-profit, limited liability, etc., then submit a copy of the documentation to ISC2 for our records once completed.

Official Phase

The final phase of the Application Process is becoming an official chapter. ISC2 will review the materials submitted in the Chapter Application Portal and will determine if all the requirements have been met to become an official ISC2 Chapter. Groups will be notified if they are approved or declined by the regional office. If approved, the group will receive a notification providing details about next steps.

Official Chapter Welcome Kit
After the chartering chapter is notified of becoming an official ISC2 Chapter, ISC2 will prepare a custom Official Chapter Welcome Kit containing your official welcome letter, signed charter, certificate, and other materials. ISC2 will also provide a variety of customized marketing materials for your chapter's promotional and communication efforts, including templates for letterhead, PowerPoint slides, brochure and business cards. In addition, the key chapter officers will be given access to the chapter officer portal, which contains various tools and resources available for you to use.

Official Announcement
ISC2 will send an email notification on your behalf to all local ISC2 members within your geographic boundaries to announce the launch of your chapter. We recommend scheduling a new chapter meeting and inviting members to attend when sending out this message. Note that the announcement email should be sent approximately 3-4 weeks in advance of the meeting date, so plan accordingly.

Onboarding Timeline

Below are the approximate timeframes for each step in the Chapter Application Process:

- Open Enrollment   3-4 weeks
- Verification Process   2 weeks
- Evaluation Process   2-3 weeks
- Approval   1 week
- Orientation and Outreach   1 month
- Start-up Meeting, Elections, Application and Success Plan   1 month
- Implement Plan and Submit Progress Reports   3-4 months

- Submit Legal Documentation   1 month
- Final Review & Approval   1 month
- Welcome Kit and Announcements   2-3 months

Chartering groups will be organized by region and will follow the same process; however, timeframes may differ. Exact dates will be provided for each region during the open enrollment period.

Application Expiration

If your chartering chapter is not able to meet the deadlines as assigned by ISC2 or if your group becomes unresponsive, the application will be "expired" and the chartering process will be terminated. It is imperative that your chapter communicate any challenges or obstacles when completing milestones as well as any changes to the chartering chapter and/or applicant contact information as soon as possible to chapters@isc2.org.

If the applicant cannot fulfill the duties as President or can no longer proceed with the chartering process, the following options are available:

- Hold an election for another chartering member to fulfill the position as President (NOTE: the individual who fulfills this role will need to meet the same applicant requirements as identified earlier in this document).
- Expire the application if a replacement cannot be found or there is no interest to form the chapter.

If a chapter application has been expired, the applicant cannot reapply until one full open enrollment period has passed.

Branding and Logo Usage

As a chartering or official ISC2 Chapter, it is important to maintain the integrity and reputation of the ISC2 brand and accurately represent your chapter accordingly. Please note the following when using ISC2's name and logos:

- **Autonomous from ISC2 -** Official and chartering chapters must clearly indicate on their website and marketing materials that they are a chapter of ISC2, but **not** owned, managed, or controlled by ISC2 and operates independent of ISC2. Always reference yourself as a "chapter" in your communications.

- **Chartering Chapter Logo -** Chartering chapters may use the chartering chapter logo (on right) when communicating and promoting the group.

- **ISC2 Logos –** Chartering chapters should only use the Chartering Chapter logo provided by ISC2 in the Chapter Start-up Kit. **Do not use the Official Chapter logo or standalone ISC2 logo on any communications materials without seeking permission from ISC2.**

- **Official Chapter Logo -** Use of the Official ISC2 Chapter seal is allowed only when the chapter has received its official charter. A customized Official Chapter logo will be provided to chartering chapters after the official charter is received.

- *ISC2 Credential Logos* **-** *The use of the ISC2 credential logos are prohibited for use by non-ISC2 credentialed members (i.e. CAP, CCFP, CCSP, CISSP, CSSLP, HCISPP, SSCP, etc.). The chapter may not use the credential logos unless it has received authorization by (ISC2).*

Refer to the ISC2 Chapter Branding Guidelines *for additional information.*

Support and Resources

ISC2 is dedicated to helping its chapters become successful through increasing their membership and promoting the information security profession worldwide. ISC2 provides support and resources to assist with the formation and management of an ISC2 Chapter. Chapters are encouraged to utilize and participate in the following:

- **Regional Chapter Representatives**
  Each region has a dedicated point of contact to provide your chapter with guidance and support throughout the application process, as well as after you receive your charter.
- **Chapter Officer Portal**
  Once your chapter receives its "official" charter, you will gain access to official chapter materials and various tools to assist with your business operations, member recruitment, and events sponsorship are available in the chapter officer portal.
- **Communication Resources**
  There are a variety of mediums available for chapters to communicate with one another, to members and with ISC2. Here's a quick summary of these resources:
  - **Chapter Group Hubs** – a platform on the ISC2 Community where chapters can connect. communicate, and collaborate with members and other security

professionals online.

- **Chapter Officer Newsletter** – ISC2 distributes a newsletter to official chapter officers worldwide. It provides details about chapter activities, new chapter tools, resources and programs, as well as updates and announcements from ISC2, etc.

- **Magazine Column** - ISC2 features a regular column in the ISC2 *InfoSecurity Professional* magazine, where chapters are featured, and activities are highlighted.

- **Social Media Groups** - there are chapter groups on several social media sites, such as LinkedIn, Facebook, and Twitter, that are used as a platform to promote chapter activities. Many chapters have started groups on these sites as well, with the most popular being LinkedIn.

- **ISC2 Member Outreach -** Due to our **Privacy Policy**, ISC2 cannot release contact information on ISC2 members. However, ISC2 can send messages on your behalf for local outreach messages when starting up a chapter. ISC2 will send emails for special chapter events and annual meetings.

- **Leadership Meetings -** Throughout the year, ISC2 holds virtual and in-person chapter officer meetings around the world in conjunction with major industry or ISC2 conferences to provide chapter leaders the opportunity to share ideas and exchange resources.

- **ISC2 Surveys and Focus Groups –** periodically throughout the year, ISC2 will extend surveys to chapter leaders and members to gather data and gain insight into the ISC2 programs and resources being offered. ISC2 encourages feedback to make applicable program improvements and enhancements.

To learn more about ISC2 official chapter governance, annual requirements, resources, and other details to manage your chapter, please refer to the ISC2 Official Chapter Handbook.

We understand starting a chapter takes a lot of hard work and dedication. It is important to understand the duties and responsibilities involved, and to find people who are willing to make it successful. We appreciate your interest and participation in this program. Please feel free to communicate us at any time by contacting chapters@isc2.org .