

# PDA CHAPTER HANDBOOK

## Table of Contents

<b>1.0</b>	<b>INTRODUCTION</b>	<b>3</b>
<b>2.0</b>	<b>COORDINATION OF PDA CHAPTERS</b>	<b>3</b>
2.1	CHAPTER COUNCIL	3
2.2	CHAPTER WORKING GROUP	5
<b>3.0</b>	<b>CHAPTERS AND THE PDA COMMUNITY</b>	<b>5</b>
3.1	MEMBERSHIP PROMOTION AND RECRUITING	5
3.2	PARTNER EVENTS WITH PDA	5
3.3	PUBLISHING WITH THE PDA LETTER	6
3.4	COORDINATE AND ENCOURAGE MEMBER VOLUNTEERING	6
3.5	PDA AND CHAPTER WEBSITES	6
<b>4.0</b>	<b>GUIDE FOR CHAPTER OPERATIONS</b>	<b>7</b>
4.1	OFFICER ROLES AND RESPONSIBILITIES	7
4.2	ELECTIONS	8
4.3	CHAPTER COMMITTEES	10
4.4	CHAPTER PLANNING	11
4.5	STUDENT PROGRAMS	12
4.6	EARLY CAREER PROFESSIONAL (ECP) PROGRAMS	12
4.7	BUSINESS PARTNERSHIPS	13
<b>5.0</b>	<b>ADDITIONAL RESOURCES</b>	<b>13</b>
5.1	HANDBOOK ACKNOWLEDGEMENT	13
5.2	CONTACT INFORMATION FOR THE PDA MEMBERSHIP AND CHAPTERS MANAGER	13
5.3	CHAPTER BYLAWS	13
5.4	CHAPTER FINANCIAL PRINCIPLES	13
5.5	CHAPTER EVENT MARKETING AND SCHEDULING POLICY	13
5.6	CHAPTER LIST USAGE AGREEMENT POLICY	13
5.7	CHAPTER LEADER TRAVEL AND EXPENSES POLICY	14
5.8	REGULATORY SPEAKER REQUEST POLICY	14

<b>5.9 PDA Logo Usage Policy</b>	<b>15</b>
<b>5.10 Collaboration with External Groups Policy</b>	<b>15</b>
<b>5.11 Membership Privacy</b>	<b>16</b>
<b>6.0 Appendix</b>	<b>17</b>
<b>6.1 Sample Chapter Policies and Procedures</b>	<b>17</b>
<b>7.0 Revision History</b>	<b>17</b>

## 1.0 Introduction

The PDA Chapter Handbook is a reference guide for Chapter volunteers. It provides information for new Chapter leadership, suggested Chapter activities, tips for planning Chapter events, the resources available to Chapter leaders from PDA, and guides to the rules that govern PDA Chapters.

New chapter Presidents will be asked to acknowledge receipt of this handbook as part of onboarding and orientation for the Chapter Council. The receipt acknowledgement form is hyperlinked in the resources section. Chapter Council members may suggest revisions or updates to this handbook at any time by submitting suggestions in writing to the PDA Chapter Manager. Current contact information for the Chapter Manager is hyperlinked in the resources section.

## 2.0 Coordination of PDA Chapters

### 2.1 **Chapter Council**

#### 2.1.1 Composition

The PDA Chapter Council represents the interests of the Chapters to PDA. Each Chapter President and President-Elect are automatically members of the Chapter Council. These individuals are the primary liaisons with PDA and work closely with the PDA Chapter Manager to maintain communication about Chapter and PDA initiatives. The Chapter Council is led by the Chair, who is the staff member who heads the PDA Membership Department, and a Vice-Chair, who is a chapter volunteer elected bi-annually by the chapter council.

#### 2.1.2 Monthly Meetings

Chapter council meetings take place monthly on a schedule to be determined periodically based on feedback from Council members. Chapter Council meetings are forums for Chapters to learn more about PDA programs and to discuss Chapter issues with fellow Chapter leaders. If the Chapter President or President-Elect are unable to attend, a designated replacement from their Chapter Board should attend on their behalf.

#### 2.1.3 In-Person Meetings

When possible, Chapter Council meetings may take place in person during signature PDA conferences including, but not limited to, the PDA Annual Meeting, and the PDA/FDA Joint Regulatory Conference. In such cases the registration fee for the Chapter President will be reduced to 50% of the prevailing standard rate to encourage in-person attendance. An elected chapter officer (President-Elect, Secretary, Treasurer, Member at Large) may receive the President's complimentary registration in the event the President is unable to attend. Please note that discounts apply only to the conference and not to related workshops and/or training courses.

#### 2.1.4 Chapter Council Vice-Chair

##### 2.1.4.1 Requirements

###### 2.1.4.1.1 Current member of PDA

- 2.1.4.1.2 Active chapter leader for two years preceding election; or current or former Chapter President.
- 2.1.4.1.3 Term – two years; limited to two consecutive terms.
- 2.1.4.2 Nomination and Election
  - 2.1.4.2.1 Candidates may be nominated by current Chapter Council members, or PDA staff with direct knowledge of the nominee's attributes.
  - 2.1.4.2.2 Nominations should be collected before the first chapter council meeting of an election year.
  - 2.1.4.2.3 Only current council members (current chapter presidents and presidents-elect) may vote. Voting shall be conducted by the PDA Membership and Chapters Manager, by email or other suitable means to ensure that only one vote is allowed per person. Voting shall be completed at least one month prior to the end of the current term.
  - 2.1.4.2.4 The start and end of each Vice-Chair's term shall coincide with the Chapter Council meeting held closest to the PDA Annual Meeting in that year.
- 2.1.4.3 Time Commitment – Expect to put in 1 to 2 hours of work per week during maintenance periods, 2 to 5 hours per week for weeks when you have a Chapter Council meeting. If you are aggressively helping other Chapters with new programs, committees, initiating policies, developing websites, contacting members, etc., plan for about 2 to 10 hours per week.
- 2.1.4.4 Overall Responsibilities – It is the Vice-Chair's role to ensure that the Chapters work together as a team with common goals with each other and PDA. The Vice-Chair acts in conjunction with other Chapter Council members and PDA staff in a support function, resolving issues and directing resources to help the Chapters.
- 2.1.4.5 Specific Duties:
  - 2.1.4.5.1 Coordinate the planning of the Chapter Council's activities for the year ahead.
  - 2.1.4.5.2 Assist in the development of Chapter Council Meeting agenda content in consultation with PDA Staff and selected members of the Chapter Council as needed.
  - 2.1.4.5.3 Oversee the activity of the chapter working group
  - 2.1.4.5.4 Ensures that Chapter Council members have had the opportunity to review the agenda and add their requested agenda items.
  - 2.1.4.5.5 Ensures that all new Chapter Council members get a proper orientation to the Chapter Council and to PDA Leadership.
  - 2.1.4.5.6 Ensures that the decisions and recommendations made by the Chapter Council are followed through.

2.1.4.5.7 Delegate responsibilities to other Chapter Council members and encourage their full participation.

2.1.4.5.8 Evaluate the work of the Chapter Council with other committee members and PDA Staff in concert with PDA's strategic plan.

## 2.2 Chapter Working Group

The working group is a subset of the full Chapter Council, whose mission is to advance strategic initiatives through the implementation of specific projects delegated by the Chapter Council. It is led by the Chapter Council Vice-Chair. Membership is open to any chapter volunteers who are current PDA members and wish to participate. The schedule varies depending on the needs of the committee.

## 3.0 Chapters and the PDA Community

### 3.1 Membership Promotion and Recruiting

3.1.1 A primary purpose of the Chapter is to increase interaction and involvement of the pharmaceutical and biopharmaceutical communities in PDA as well as develop brand loyalty (ie. to promote PDA). There are many different ways to do this and chapters are encouraged to think creatively in addition to considering some of the suggested approaches noted below.

3.1.2 Provide PDA membership materials at every Chapter event.

3.1.3 Maintain a significant price differential between member and non-member rates for Chapter events.

3.1.4 Present a brief overview of PDA, its mission, and membership benefits at Chapter events.

3.1.5 Customize and run the PDA "Silent Slide Show" (available through the PDA Global Chapter manager) during the networking and dinner portions of your meetings.

3.1.6 Tell colleagues about your experiences with PDA and why you are a member.

3.1.7 Send a welcome message to new chapter members when they join and invite them to get engaged.

3.1.8 Contact Chapter members when their PDA membership is about to lapse and encourage them to renew.

3.1.9 Ensure that the chapter is always represented at every Chapter Council meeting.

3.1.10 Join the PDA Membership Advisory Committee.

3.1.11 Promote current opportunities for volunteering with PDA to chapter members.

3.1.12 Promote PDA to area universities and build relationships with faculty.

### 3.2 Partner Events with PDA

3.2.1 Coordinate a conference or symposium with PDA or volunteer on the program planning committee of PDA events being held in your chapter territory.

3.2.2 The PDA Education team can tailor specific training events for local audiences that allow attendees to participate without expensive travel.

### 3.3 **Publishing with the PDA Letter**

The PDA Letter article submission process is online at <https://www.pda.org/pda-letter-portal/home/submit>. New submissions on technical topics are always welcome. Photos and recaps from chapter events are also welcome and are a good way to raise awareness of the chapter for future events. See the Letter website for up-to-date information.

### 3.4 **Coordinate and Encourage Member Volunteering**

Chapters' role as a link between PDA and local members creates opportunities to connect members to open volunteer opportunities outside of the local chapter. Current opportunities can be found online at <https://www.pda.org/membership/upcoming-volunteer-opportunities> and there are several important areas where volunteers are needed regularly:

3.4.1 Task Forces – develop and write a variety of documents including Technical Reports, Points to Consider, Surveys, Standards, and white papers. Task Forces are established and overseen by Technical Advisory Boards.

3.4.2 Peer Review – the material created by Task Forces is rigorously peer reviewed and reviewers are needed year-round.

3.4.3 Program Planning – Individuals may apply to serve on a program planning committee, but chapters are also encouraged to provide representation to these committees when events are planned in the chapter territory.

3.4.4 Interest Group Leadership – successful IGs require multiple regional leads as well as volunteer coordinators to manage activities and engage members.

### 3.5 **PDA and Chapter Websites**

3.5.1 The PDA Website ([www.pda.org](http://www.pda.org)) contains information about all aspects of PDA including membership, publications, task forces and interest groups, technical information, events, and chapters. Each chapter has a dedicated page, and there are external links to Chapter-run websites where applicable. Chapters are encouraged to submit information to be posted on the PDA Website. Contact the PDA Chapter manager with updates to your chapter's page on the PDA Website.

3.5.2 PDA provides full-service websites to Chapters free of charge. These websites include the ability to utilize the PDA online registration system. Content can be provided in the Chapter's local language if translation is provided by the chapter. Each chapter should appoint an officer or other representative to coordinate website activities with PDA.

3.5.3 PDA strongly encourages each Chapter to take full advantage of this resource. By having a central location for PDA and Chapters, all benefit through the reinforcement of the PDA "brand." Website visitors looking through the PDA website calendar can find chapter programs, and vice-versa. This in effect will develop a stronger, larger group of active PDA members.

## 4.0 Guide for Chapter Operations

### 4.1 **Officer Roles and Responsibilities**

4.1.1 Chapter Board Officers must be current PDA members in good standing for the full duration of their elected term and must live or work primarily within the territory of the chapter for which they volunteer.

#### 4.1.2 President

4.1.2.1 Preside over all Chapter activities including Board meetings

4.1.2.2 Enforce the By-Laws

4.1.2.3 Present at the Chapter Annual Meeting all reports required by law and such other reports, suggestions, or communications deemed necessary

4.1.2.4 Sign all contracts in the name of the Chapter

4.1.2.5 Represent the Chapter at Chapter Council meetings

4.1.2.6 Engage with committees to promote successful events and tasks

#### 4.1.3 President-Elect

4.1.3.1 Perform the duties of the President in the temporary absence of the President and shall succeed to that office in the event of a vacancy, or at the end of the President's term.

4.1.3.2 Represent the Chapter at Chapter Council meetings

#### 4.1.4 Secretary

4.1.4.1 Take notes during meetings, preserve minutes and Chapter history

4.1.4.2 Perform the duties of the President-Elect in the temporary absence of the President Elect and may succeed to that office in the event of a vacancy upon approval of the remaining officers of the Board.

#### 4.1.5 Treasurer

4.1.5.1 Receive and deposit all Chapter moneys in banks approved by the Board and keep accurate accounts

4.1.5.2 Develop an annual budget with the PDA Chapter Manager, make disbursements upon proper vouchers, sign checks, report on the Chapter finances annually and whenever requested by the Chapter President or Association President, and deliver to his/her successor all books, moneys, and other Chapter property then in his/her possession.

4.1.5.3 Provide complete, accurate and timely record keeping as required and essential for the health of the Chapter.

4.1.5.4 Manage all incoming funds of the organization, including but not limited to electronic transfers, cash, checks and credit/debit cards. Funds come from sponsors and attendees at events, and reimbursement of collected funds from PDA. Prompt invoices and deposits are essential to maintaining accurate records of receipts and making those funds available to pay bills.

- 4.1.5.5 Manage all outgoing funds and obligations of the organization including payments and automatic withdrawals for the costs of managing the chapter such as bank fees, email platform fees, hosting fees and credit card costs; payments or reimbursements of the costs of functions, events, and programs including payments to hotels, caterers and AV costs for dinner meetings; honorariums to speakers and reimbursement of approved speaker travel expenses; payments to colleges for scholarships; reimbursements and sanctioned expenses of student chapter; payment of board meeting expenses; and reimbursement to board and committee members who purchase board approved items for the Chapter with their own funds. Prompt payment is always appreciated and promotes goodwill.
  - 4.1.5.6 Persons with access to the Chapter's accounts should be limited to those who perform Treasurer duties, the President, and the President-Elect. When elections take place, it is the Treasurer's responsibility to spearhead adding the new officers and removing the old officers from the Chapter accounts.
  - 4.1.5.7 Bank statements must be reconciled upon receipt. An independent voice (not someone who performs Treasurer duties) should receive the bank statements and report to the board as statements are received if all looks well or if there are unusual transactions that need explanation. The independent voice reports and the Treasurer reports must be included in Board meetings.
  - 4.1.5.8 Reporting requirements include keeping accurate records of moneys coming in and going out, reconciling the profitability or loss of events, reporting the financial condition of the Chapter at all board meetings, and providing financial records requested by PDA. Treasurer activities must comply with the PDA Chapter Financial Principles.
  - 4.1.5.9 See Resource: Chapter Financial Principles
  - 4.1.5.10 See Appendix for an Example of Budgets.
- 4.1.6 Members-at-Large
- Have voting rights and a voice on the Board; perform duties as assigned such as chairing chapter committees or supporting events and promoting chapter activities within their network.

## 4.2 Elections

### 4.2.1 Nominating Committee

- 4.2.1.1 The Chapter President may assign a chairperson to head the Nominating Committee. It is recommended that this person be knowledgeable of chapter members and operations to provide the necessary experience and leadership to the committee. Persons serving on the Nominating Committee must be members in good standing in the chapter.



- 4.2.1.2 The principal duty of the Nominating Committee is to seek, evaluate, and recommend potential candidates to fill the slate of officers in preparation for chapter elections every two years. Additional details including roles and responsibilities for the Nominating Committee should be detailed in the chapter's committee policy.
- 4.2.1.3 Policies adopted by nominating committees must assure fairness and transparency to the members of the chapter including the opportunity for members to submit nominations to the committee. Furthermore, the committee should consider PDA's Value of Inclusion as published in the strategic plan when endorsing a slate of candidates; PDA's goal is to "focus on improving diversity and inclusion in our volunteer activities, so the organization is representative of our membership and gives all parties a voice."

#### 4.2.2 Voting

- 4.2.2.1 Once the slate of officers has been approved by the Board, it is then sent out to all members in good standing in the Chapter for voting, requiring a response by a specific date. Any response received after the specified date should not be counted. The ballot should contain information concerning each candidate's qualification for the position. The most efficient and cost-effective method of voting should be utilized whilst ensuring procedures surrounding integrity of the vote. In the event of a tie for any position, one of the tied candidates is elected by vote of a majority of Chapter Board Officers.
- 4.2.2.2 The results of voting will be announced, and the newly elected officers will be formally introduced to chapter members and begin their two-year term immediately upon completion of the previous term.

#### 4.2.3 Officers Transition Checklist

- \_\_\_ Establish transfer date and duties for old and new board during the transition period (such as approving the new budget and establishing the new meeting dates).
- \_\_\_ Add incoming President-Elect and Treasurer as signatories to the Chapter bank accounts and evaluate if additions or removals are appropriate.
- \_\_\_ Send the new officers' names, photos, and information to PDA to update the Chapter website. Evaluate if other changes are necessary to the website.
- \_\_\_ Board members with membership information access must sign the PDA's List Use Policy (see Policies below) and send a signed copy to PDA.
- \_\_\_ Review by-laws and policies.
- \_\_\_ Appoint chairs for committees such as Scholarship, Nominating, Membership, Events, Program and Sponsor Committees.
- \_\_\_ Review and approve the budget. Approve expenditures, as necessary.
- \_\_\_ Assign Chapter email address to board members if appropriate or possible.

- \_\_\_\_\_ Review and redesign (if desired) the president's slides template used at the start of dinner meetings and webinars.
- \_\_\_\_\_ Receive, review, grant and remove access to central documents platform as appropriate.
- \_\_\_\_\_ Review Communication protocols.
- \_\_\_\_\_ Set the calendar for board meetings, dinner meetings, webinars, and other special events throughout the year.
- \_\_\_\_\_ Approve speakers, topics, locations and sponsor plan for upcoming dinner meetings and webinars.
- \_\_\_\_\_ Approve agenda template and assign or create agendas for board meetings.
- \_\_\_\_\_ Review and approve committee reports, meeting minutes, and treasurer reports.
- \_\_\_\_\_ Submit year end Chapter report and required information to PDA by the deadline.
- \_\_\_\_\_ Attend and participate in Chapter Council meetings. Report necessary information back to the board.
- \_\_\_\_\_ Represent the Chapter at scheduled PDA events.

### 4.3 Chapter Committees

- 4.3.1 Chapter committees can drive important activities, provide structure and continuity, and help to include more volunteers in the leadership of a Chapter. The Chapter Board may create any number of committees to carry out Chapter activities. To chair any committees, the individual must be a PDA member residing in the geographic territory of the Chapter. Below is a suggested list of committees and their proposed functions.
  - 4.3.1.1 Business Partnerships – can be considered to explore meeting locations, membership drives, speakers, open board positions, and surplus equipment donations to local schools.
  - 4.3.1.2 Communications – Maintains the Privacy Policy. Creates and manages communication protocols, meeting announcements and email correspondence with the members and interested parties on the mailing list.
  - 4.3.1.3 Donations – for worthwhile organizations in alignment with the Chapter's goals may be considered if sufficient funding is available. Donations must be approved by the Board.
  - 4.3.1.4 Event Logistics – Maintains the Events Fee Policy and Tour Policy. Researches and selects function spaces and menus for Chapter events. Responsible for contracts and negotiates pricing.
  - 4.3.1.5 Membership – Maintains the member roster. Reaches out to expired members and welcomes new members.

- 4.3.1.6 Nominating – Maintains the Nominations and Elections Policy. Research candidates to perform board duties in the Chapter and presents nominations to the board.
- 4.3.1.7 Philanthropy – Maintains the Philanthropy Policy. Reviews and presents recommendations to the board for philanthropic opportunities for the Chapter to participate.
- 4.3.1.8 Programs – Maintains the Speaker Policy. Identifies topics of interest in the industry and selects speakers. Responsible for reviewing presentations for appropriate content.
- 4.3.1.9 Scholarships – Maintains the Scholarship Policy. Reviews applications and presents recommendations to the board for scholarship winners.
- 4.3.1.10 Social Media – Create policies and identify mediums to disseminate Chapter information and activities
- 4.3.1.11 Sponsorships – Maintains the Sponsorship Policy. Creates sponsor opportunities and interfaces with sponsor contacts at each event.
- 4.3.1.12 Students and Early Career Professionals (ECPs) – partnerships with Colleges or Universities introduce the PDA organization to Students and ECPs who are the future of our industry.

#### **4.4 Chapter Planning**

4.4.1 Budget and calendar planning on an annual basis

4.4.2 Chapter Event Types

4.4.2.1 Technical Programs

An educational program including one or more speakers or a panel. In-person programs often include networking and exhibit opportunities. Range in scope from short virtual events to full-day programs.

4.4.2.2 Member Appreciation / Networking

These events can include motivational and professional development presenters, interesting conversations, and fun social activities.

4.4.2.3 Facility Tour

A guided tour of a local area facility often including a relevant technical presentation. The event portion can be held at a traditional venue or hosted by the facility where the tour is taking place.

4.4.2.4 Student and Early Career Professionals

Technical topics relevant to early career professionals or students can often be presented by chapter volunteers or other chapter speakers. Focus topics can also include career path and career advancement, or general information about the industry and about PDA. Give students and ECPs plenty of time for questions and be sure to include networking both among the target audience members and with more experienced members in order to create new connections.

#### 4.4.2.5 Partnering Events

- 4.4.2.5.1 Share the work! Speakers, location, timing, costs, menu, meeting handouts, meeting evaluations, speaker honorariums, negotiations
- 4.4.2.5.2 In the planning stage, agree on a price for each organization to charge its members and how to split costs and profits.
- 4.4.2.5.3 Keep registration separate for each organization so as not to mingle or share members personal information. Each group reaches out to their members to advertise the joint meeting.

4.4.3 See Resources: Chapter Event Planning and Marketing Policy, Collaboration with External Groups Policy

### 4.5 Student Programs

- 4.5.1 Chapters are encouraged to establish Student Chapters in their geographic region. The purpose of Student Chapters is to facilitate affiliation of students with PDA through local activities and interaction with PDA Chapters; to help students learn about the industry and gain insight into future career opportunities; and to build relationships with academic institutions to facilitate the exchange of scientific and technical information.
- 4.5.2 Invite Student Chapter officers and faculty liaisons to attend Chapter board planning meetings. Provide agenda time for the Student Chapter to share their plans and identify areas where the Chapter can support them.
- 4.5.3 Encourage students to participate at Chapter meetings and events by providing them opportunities to help with registration and logistics support and introduce them to industry members.
- 4.5.4 Seek membership support for speakers at student meetings, donations of excess or unused supplies, internships, and company tours.
- 4.5.5 Scholarship criteria for Student Chapter members is evaluated based on a satisfactory grade point average and industry related courses and should include their participation in Chapter activities and events.

### 4.6 Early Career Professional (ECP) Programs

ECP members should be encouraged and supported as the future leaders of the association. PDA and Chapters need new professionals and their perspective to inform the full range of association activity and thus chapters should consider creating opportunities for ECP members such as:

- 4.6.1 Hold ECP-focused networking events
- 4.6.2 Establish an ECP membership committee
- 4.6.3 Recruit new volunteers for Chapter and PDA Committees to represent ECP interests
- 4.6.4 Host technical meetings or training focused on ECP issues and challenges.
- 4.6.5 Engage younger professionals and students through member involvement in STEM programs or presentations

- 4.6.6 Support student chapters
- 4.6.7 Maintain the scholarship program
- 4.6.8 Actively encourage, document, and publicize ECP participation in PDA activities

#### 4.7 **Business Partnerships**

To continue to grow Chapters and build their reputations with industry leaders, business partnerships may be utilized in a few key areas.

- 4.7.1 Hosting a Membership Drive: A local business hosts a membership drive at their facility. Chapter leaders explain PDA benefits and opportunities.
- 4.7.2 Business can, and typically do, subsidize PDA membership costs for their employees. Supporting Early Career Professionals is especially helpful and cost effective.
- 4.7.3 Facility Tours: Local businesses can host facility tours and networking opportunities.
- 4.7.4 Dinner Meetings: Local businesses can suggest industry topics or speakers for dinner meetings to share knowledge and education.
- 4.7.5 Industry employees and leaders can help the PDA by volunteering for leadership positions on Chapter boards or committees.

### 5.0 Additional Resources

#### 5.1 **Handbook Acknowledgement**

[View Download the Acknowledgement Form](#)

#### 5.2 **Contact Information for the PDA Membership and Chapters Manager**

[View the Chapter Manager Contact Information](#)

#### 5.3 **Chapter Bylaws**

[View the Chapter Bylaws](#)

#### 5.4 **Chapter Financial Principles**

[View the Chapter Financial Principles](#)

#### 5.5 **Chapter Event Marketing and Scheduling Policy**

[View the Chapter Event Marketing and Scheduling Policy](#)

#### 5.6 **Chapter List Usage Agreement Policy**

Chapter contact lists are intended only for the distribution of materials supporting local PDA Chapter events or activities. The lists, in whole or in part, may not be reused, duplicated, transferred, or used for any purpose other than the above and should not be shared with any third party. A signed Chapter Handbook Receipt is required from each incoming chapter president in order to receive any PDA contact

list. Contact lists are updated at the first of each calendar month or upon request to the Chapter Manager.

## 5.7 Chapter Leader Travel and Expenses Policy

Attendance by Chapter Presidents at in-person Chapter Councils Meeting is encouraged. In addition to registration considerations extended to chapter representatives, chapters may reimburse the travel expenses of representatives travelling on chapter business to conferences when a chapter council meeting is taking place. Attendance to the full program, especially the Chapter Council meeting/luncheon, is required to qualify for reimbursement. Any additional appointments in the area, not related to the event, should be scheduled so as not to conflict.

The following expenses can be reimbursed:

- Airline - Tickets must be coach fare, non-refundable tickets and a 21-day advance purchase is recommended. Transfers to/from the airport may also be included.
- Local attendees - Mileage expenses, at 0.54 cents per mile, and parking charges at the hotel may be reimbursed.
- Hotel Accommodations - Hotel room and tax charges for the days of the full program may be reimbursed. A block of rooms will be reserved at the hotel; in order to secure the group rate, reserve your room early and identify yourself as a PDA attendee to the reservations agent when you contact the hotel.

Chapters should show the exact amount being reimbursed to the individual member in the Chapter Financial Report. Please keep hotel and travel receipts to submit with the Financial Report. Incidental expenses are the responsibility of individual attendees.

## 5.8 Regulatory Speaker Request Policy

5.8.1 Reporting of Regulatory Speaker Participation: Any involvement of speakers from regulatory authorities or related bodies must be reported to PDA. For all regulators, chapters should notify PDA of the intent to invite such speakers prior to submitting a request to the agency. In situations similar to the FDA speaker request procedure outside the US and where PDA regularly engages such speakers, a request for the speaker should be executed through a PDA office (for example, EMA and other trans-national regulatory agencies in Europe should be coordinated with PDA Europe).

5.8.2 FDA Speakers from FDA Headquarters or Centers:

- Identify the desired speaker and topic with as much specificity as you can.
- Fill out PDA's Speaker Request form as completely as possible.
- When marketing the event on flyers and in emails let attendees know that an FDA speaker has been invited for the event, even though you

may not receive confirmation of a speaker's availability until shortly before the event.

5.8.3 FDA Speakers from local or District offices:

- Identify the District Director or the most senior branch officer.
- Contact the District Director to discuss the speaker/topic desired. He or she will help you determine which speaker would best fit your program need and best represent the FDA.
- Secure agreement with the District Director on the speaker, topic, date and time that works best with your chapter and the speaker.
- Transmit the details of your local agreement to the PDA Chapter Manager.
- The agreement will be submitted in a formal request letter to the FDA's headquarters office in Maryland to officially secure the commitment and to confirm that all essential parties are notified.

5.9 **PDA Logo Usage Policy**

Use of the PDA logo, tagline and all official variations are subject to the following regulations:

1. Licensed use will, in all cases, be pending submission of signed Chapter Handbook Receipt.
2. The PDA logo, including any of its official variations such as individual chapter logos, may not be fabricated by any second party. All official logos will be provided by Global PDA Marketing Department. Contact the Chapter Manager for a logo.
3. Application of the PDA logo must fall within the guidelines set forth in the PDA Style and Graphic Standards Guide.
4. The PDA logo, including any of its official variations, may not be altered or corrupted from its original form.
5. This Logo Use Agreement is not intended for third party use. Authorization is granted to original applicant only.
6. The PDA logo, including any of its official variations, is intended only for applications which by nature support either directly or indirectly the PDA Mission Elements.

5.10 **Collaboration with External Groups Policy**

PDA encourages collaboration with other not-for profit organizations when the outcome of the collaboration will benefit PDA's membership. These collaborations often take the form of co-developed deliverables, such as white papers, technical documents, or scientific meetings.

The following are steps Chapters should take in order to propose collaboration. Working with the Senior Vice President of Scientific and Regulatory Affairs or designee:

1. Develop a brief description of the collaboration for PDA approval. This can be done via e-mail.
2. The proposal should include the name of the collaborating Association and point(s) of contact (name, title, affiliation and e-mail address), the names and contact information of all proposed PDA Leader(s), and the contact information of any other proposed participants.
3. The proposal should include comments on any special conditions which may exist (draft document already created by the other association, copyright issues, unusual costs, requested timing of publication, meeting date, etc.).
4. The resultant proposal will be reviewed with the PDA President and may be submitted to the appropriate (as designated by the SVP or designee) Advisory Board and balloted. If the results are positive, the proposal (with any revisions requested or mandated by the President and/or Advisory Board) will be discussed with the originator, and then presented to the President of PDA for final approval.
5. If approved by the President, an agreement between the parties will be drafted and signed by both parties before any work is undertaken.

#### 5.11 **Membership Privacy**

PDA protects the private information of our membership and adheres to the US Federal Communications Commission (FCC) and other relevant international privacy protection laws.

##### 5.1.1 General Data Protection Regulation (GDPR)

- 5.1.1.1 GDPR is a European Union privacy law that came into effect in May of 2018 and is applicable to all members residing in the EU. The GDPR applies to organizations operating within the EU. It also applies to organizations outside the EU that offer goods or services to individuals in the EU.
- 5.1.1.2 PDA respects members right to privacy. PDA ensures all data is managed lawfully, fairly, and transparently. When PDA uses third parties to acquire personal data from our customers, PDA holds those parties to the same high standard and the same legal requirements.
- 5.1.1.3 According to the General Data Protection Regulation (GDPR), you have a right to be forgotten. You also have the right to request your personal data and information related to PDA's privacy protection policies and processes. For any assistance with GDPR email PDA at [dataprivacy@pda.org](mailto:dataprivacy@pda.org).

##### 5.1.2 Cloud-based Data Sharing Applications

PDA occasionally shares information, such as membership lists, through secured cloud-based applications. The information stored in the applications may be accessed using unique usernames and passwords.



## 6.0 Appendix

### 6.1 **Sample Chapter Policies and Procedures**

Sample Policies can be found in the online Chapter Resources page at [www.pda.org/chapters/chapter-resources](http://www.pda.org/chapters/chapter-resources)

## 7.0 Revision History

Version	Date	Summary of Changes
Chapter Handbook rv1.3	11-Jan-22	Revised and expanded. Resources and appendix added.