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## **BDPA Chapters: Managing a Chapter**

The following documents are either part of the BDPA Chapter Management Guide or documents that support the process of creating a local BDPA Chapter.

### **Chapter Management Guide**

- [Book 1: Leadership](#)
- Book 2: Duties of Chapter Officers
- Book 3: Leading & Managing Effective Committees
- Book 4: Membership
- Book 5: Meetings
- Book 6: Communicating with Members and Prospective Members
- Book 7: Finance and Accounting
- Book 8: Officer Transition Book: An Overview of Your Responsibilities
- Book 9: Tips on How to Reactivate Your BDPA Chapter
- Book 10: Forms & Samples (*Please see list below*)
- Book 11: Identity Program Guidelines

### **Other Documents**

- Tips on How to Reactivate Your BDPA Chapter
- Model Chapter Bylaws

### **Forms & Samples**

- Chapter Officer Form
- Chapter Budget Worksheet
- Financial Information and Direct Deposit Information & Form
- Application and Instructions for Chapter EIN Number
- Sample Phone Script: New & Prospective Members
- Organizational Chapter Survey Form
- Reactivating Chapter Program Survey Form
- Basic Chapter Budget Worksheet
- Template for Meeting Agenda
- Sample Meeting Minutes

- Sample Prospect Letter
- Why Belong to BDPA CHAPTER Letter?
- Sample News Release Form
- Sample Non-Renewal Member
- Sample New Member Follow up letter
- SITES Budget Template
- Wayne Hicks Documents (More to come)

To learn more about local Chapters, please contact the National Vice President of Membership Management or any of the local Chapter Presidents.

# Book 1

## Chapter Leadership

**Leadership** Congratulations! As an BDPA chapter officer or committee chairman, you will participate in a vital function – helping guide your professional **organization** toward its goals and objectives. Serving as a volunteer leader will be an enjoyable and educational experience. It will provide you with an opportunity to develop your leadership talents, make new friendships, and help determine the future course of your chapter and the **organization**. Each chapter officer and committee chairman has an obligation to all other chapter members. The success or failure of your chapter depends on your ability to provide strong leadership and clear direction. It takes many years of planning and hard work to develop a strong chapter, but only one year of ineffective leadership to destroy it. Since you will probably be carrying out your BDPA CHAPTER duties on your own time, it will be important for you to make the most effective use of that time. Knowledge of basic planning and organizing techniques will eliminate “wheel spinning” and will help your to get the most out of the hours you devote to BDPA and your chapter, specifically.

### Your Benefit as a BDPA CHAPTER Leader

There are many benefits – both personal and professional – that go hand in hand with the challenge of volunteer leadership in organizations. For example, you will:

- Gain greater recognition and prestige.
- Make valuable contacts.
- Sharpen your management and communications skills.
- Gain business experience you might not otherwise achieve.
- Broaden your understanding of the field.
- See, before others do, what the future holds for your profession.
- Try out ideas and methods that perhaps you never get a chance to try on the job.

- Take pride in adding to your resume service to a professional organization.

And much more!

### **What is a Leader?**

A leader is a manager, not an administrator. An administrator follows a certain set of procedures whether they produce results or not; a manager makes things happen. Leaders can be described as energetic, outgoing, organized, decisive, and well-balanced. Leaders get their information primarily from working with other people. Leaders are doers. They are made, not born. They can see farther into the future than those around them.

### **What Motivates (Volunteer) Leaders?**

It's not money! In **organization** volunteer work, each person must be self-motivated. This is one of the reasons why **organization** leadership is so challenging. For many, the motivation for becoming a volunteer leader is not only the benefit they receive from leadership, but also the repayment of a debt. They believe that if they are successful in their field, they should put something back into the field by working to improve it through their professional **organization**.

### **Seven Steps to Better Leadership**

#### **1. Know exactly what your duties are**

Understand the mission and goals of the **Organization**. Know the objectives, priorities, and decision-making processes of the **Organization**. Familiarize yourself with BDPA's programs and activities. Read BDPA periodicals and publications. Key in on your role and specific responsibilities as a chapter leader.

#### **2. Learn to be a better communicator**

To be a communicator you should:

- a Use commonly understood terms. Make sure that people you are speaking to understand the point you are trying to make.
- b Listen with all your senses. Listening is one of the most important things a good leader can do. Surveys show most people grasp only 50% of what is being said. You'll gain a lot more if you give the person speaking your undivided attention; maintain eye contact; watch for body language that may either support or contradict the verbal message; and don't interrupt.

#### **3. Stay informed**

of trends and developments that are likely to affect NBDPA and BDPA Local Chapter a few years down the road.

After all, to effectively "lead" you must be one step ahead of the rest. It's also important for you to keep informed of the priorities and opinions of other BDPA members. This diversity leads to a wide range of expectations about what direction BDPA –and your chapter – should be taking.

#### 4. Be positive in your approach

Keep an open mind when a new idea is proposed. Some companies insist that before a new idea is criticized; those involved in the brainstorming session must first state three positive things about it.

#### 5. Learn to be better organized

It helps if you categorize your work by the “**Four D’s**” of time management:

##### **Dropping, Delaying, Delegating and Doing.**

**Dropping** – When you go through your in-box, throw out anything that doesn’t fit with what you’re trying to achieve. Any request not in line with your objectives should be given a standard even tactfully negative, written or verbal. **The “Four D’s” Continued...**

**Delaying** – Generally, never delay anything that will take you more time to do tomorrow than it will today. This is often the case with half-finished projects that once stopped, will require you to again build up momentum. Delay low priority items until times when you are feeling less efficient or when you need filler work. You’ll find that once delayed, many low priority items cease to have meaning and can be dropped completely.

**Delegating** - Many people hesitate because they believe that no one can do the jobs as well as they can. As a result, they get caught up in tasks that should be delegated to others, and never get to many important matters.

**Doing** - To get things done effectively, plan ahead by at least one day. Each day keep a “to do” list for the future. As you think of new things that need to be done, add them to your list. At the end of the day, see how many items can be dropped, delayed, delegated or combined. Then update your list for the next day.

#### 6. Eliminate Time-wasters.

For example don’t:

- a Attempt to much
- b Estimate time unrealistically
- c Procrastinate; or
- d Engage in reverse delegation. This occurs when others bring their problems to you to solve, instead of solving the problems themselves.

#### 7. Learn how to be more persuasive.

Arm yourself with factual documentation of your viewpoint, make your associates want to believe you by appealing to more than their logic. The emotional side of persuasion involves, first of all, establishing rapport. Take the time to talk with your colleagues.

Find out their interests aside from the business world. Use active listening. In meetings especially, this involves listening sincerely to an objection that is raised. After the speaker is finished, re-state the person’s point clearly on the floor.



Then you can deal with the objection from a point of mutual understanding. Often, when the “objector” hears the point restated the “objection” melts away...there isn't such a big problem after all.

## **Breakdowns in Leadership**

### **1. Improper expectations.**

This includes expecting too much from yourself – or not enough. Or the members may expect too much – or not enough – or expect the wrong things.

### **2. Lack of imagination.**

The larger the organization, the more difficult it is to be creative, dynamic and responsive to change.

### **3. Emphasis on the authority of leadership.**

“I'm the president; therefore you will do it my way.” This doesn't work in a volunteer organization. You have to motivate people for the right reasons.

### **4. A failure to lead because you feel you don't have to lead.**

“We're doing as well as the next chapter” or “I'm doing as well as the next guy.” Real leaders do not accept the mediocrity of a “C” average. They want to “win”, are excellent at instilling a winning attitude, and are able to get great cooperation from others to achieve the desired results.

## **Tips on Leading a Meeting**

1. Anticipate the attitudes and positions of those who will be attending the meeting.
2. Organize materials in advance and know everything you want to say.
3. Avoid using distracting mannerisms when speaking.
4. Be prepared to consider suggestions and opinions pertinent to the matter under discussion.
5. Keep the discussion moving along by asking a general question of the group or, if this fails, a specific question of a particular person.
6. Balance the discussion; don't let any single point of view predominate when others are to be heard.
7. Keep the discussion on track.
8. Break up controversies. This might be done by injecting a little humor. If things get really hot, you can call a short recess.
9. Finish the meeting on time.
10. At the conclusion, make sure positive action is initiated. Never leave the meeting proud that you merely “finished the agenda.” State a conclusion, summarize the results, and get the required action started.

## Developing Leadership

### 1. BDPA's Chapter Leadership Workshops.

These provide a good opportunity for chapter leaders to develop leadership talents and exchange ideas with BDPA members from across the country. These one-half day workshops are scheduled during the BDPA Annual Conference and all regional conferences sponsored by the **Organization**.

Typical workshops include discussions on the BDPA national organization, chapter organizations, the duties of chapter officers, and chapter programming. Each session also includes time for an open forum discussion during which chapter representatives exchange ideas on membership recruiting and retention; programming; fundraising and financial management; motivating members; and more.

These sessions are open to all chapter members at no charge. Current chapter officers and other members interested in serving BDPA on the local, regional and national levels are encouraged to attend these informative sessions.

### 2. Other Development Opportunities.

Whenever the leaders of various BDPA chapters or other organizations meet, there is an opportunity to exchange ideas and information which will benefit your chapter.

Other opportunities for leadership development include:

- BDPA group meetings
- BDPA regional meetings
- Joint meetings with other BDPA chapters
- Joint meetings with other professional organizations
- Seminars/workshops sponsored by employers
- Articles, reports and books on leadership development

## The Chapter's Role in BDPA

### 1. Importance of Chapters.

To many members, the most important benefit of BDPA comes from participating in the activities of the local chapter. Consequently, member participation, retention, and gaining new members are significantly affected by the quality of the programs at the chapter level.

### 2. Comparative roles of National and Chapters

The high-tech, high-touch environmental factors help define the roles of both BDPA (national) and the BDPA chapters. While there is – and should be – enough overlap to assist coordination, basically:

- BDPA's -national role is to provide the "high-tech" information and programs.  
(Yes, there should be a degree of high-touch, but the major emphasis is on high-tech.)
- A BDPA chapter's role is to provide fulfillment of the "high-touch", personal needs of members. (Yes, there should be a degree of high-tech, but the major emphasis is on high-touch.)

The chapters don't exist just to support the national BDPA (although that's important), nor does the national BDPA exist solely to support chapters (although that, too, is important.)

Certainly, both exist to support each other, but that's not the main reason for being in existence. The main reason the national BDPA exists, and the chapters of BDPA exist, is for a singular purpose:

*TO BENEFIT MEMBERS ...and to do so requires...*

## **A CHAPTER/ NATIONAL PARTNERSHIP**

...this means... **A WIN-WIN-WIN RELATIONSHIP** ...chapters "win" and national "wins" because the individual members win!

### **3. Member participation**

The importance of active member participation is obvious...and this is equally true for participation at both the chapter and national levels of BDPA. When BDPA can attract only 10% of the membership to its series of conferences, things could be better. Likewise, when a chapter attracts only 22%-25% (the overall average among the BDPA chapters) of its members to the average chapter meeting, things could be better there too! In research study after study, across many types of **organizations**, the facts say 50% of the members don't or won't – participate!

These are informally known as "checkbook" members; they belong just because they want to...or for some other reason than what most consider the direct, tangible benefits of membership. A second "given" is that the overwhelming majority of professional (individual member) **organizations**- no matter how good these **organizations** are in delivering solid, member benefits, can't seem to attract (penetrate) more than 50% of the market for members. Applying these two statistical averages to the professional universe (total market for members), what we're really dealing with is a participation of 25% of that total market.

### **Summary**

BDPA chapters provide a key element in the total BDPA membership benefit delivery system. The specific program emphasis of a given chapter, as well as the operations of the chapter, must be targeted to fulfilling identified needs of members in that chapter. (The exact member needs will vary somewhat, from chapter to chapter.)

Together – as partners in fulfilling total member needs and expectations – the BDPA chapters and the national BDPA form an unbeatable team!

## **Plan to Succeed**

### **1. "Planning is the Key to Success."**

That may be an often-used expression, but it remains accurate. BDPA chapters that are most successful, and exhibit the greatest ability to meet the needs of their members, are the ones that have planned for their success.

No chapter plans to fail, but too many chapters fail to plan. Taking the time to plan and organize every aspect of your chapter's activities is the only sure way to get the kind of performance that will enable your chapter to achieve its goals.

## **2. Organize to Plan**

Successful planning doesn't just happen. It is the responsibility of the chapter officers (the Chapter Executive Committee) to achieve the best possible results from the time and effort devoted to the planning process. Realistically, leaders of the chapters will do most of the planning and practically all the decision making. However, every chapter member should be involved in some phase of the planning process. Member input can be used in the early stages of planning to determine needs and identify problems. Members should also be actively involved in developing specific programs and activities. This involvement helps to foster the feeling that it is "our plan" rather than "their plan." Here are seven tips which will help your chapter get the best results from the planning process.

These will help you set the proper environment for successful planning.

- The greater the participation in the planning process, the more involved the members will be in executing plans.
- Make use of former officers and senior members of the chapter. Use their experience and knowledge.
- Provide ample time for planning. Your goal should always be to complete your plan for the entire year prior to the first meeting of the administrative year.
- Make sure that those who are asked to plan have the authority to plan in their assigned areas.
- Planning can be a difficult task, but not nearly as difficult a task as overcoming the problems caused when a chapter fails to plan.
- Remember that proper planning involves sufficient lead-time; it's an annual process.
- Use the planning information in this guide. You'll find that it will help you develop actionable, effective plans without an inordinate amount of effort.

Naturally, these tips are intended to highlight a few of the basic considerations involved in planning successfully. The "Six Planning Steps" which follow, being operational suggestions, are not intended to provide a conceptual framework for planning. The underlying concepts are discussed in depth in Strategic & Operational Planning in the Leadership Appendix section.

### **Six Steps to Basic Chapter Planning**

The planning process is comprised of six basic steps. If you follow each step you will develop a comprehensive and workable plan. These steps should be applied when developing your chapter's annual operating plan, as well as for specific chapter activities such as membership recruiting, programming, etc.

#### **STEP 1: Identify Member Needs.**

The BDPA Statement of Missions and General Objectives provide the overall purpose and primary objectives of the **Organization**. Each chapter strives to achieve these by meeting the specific needs of the chapter members.

- Able to reflect progress & GOALS
- Realistic
- Personalized

Obviously, a chapter cannot hope to satisfy the needs of its members without first identifying exactly what those needs are. In addition to identifying the needs of the chapter members, it is important for the chapter to recognize its strengths and weaknesses. The Chapter Evaluation Checklist has been developed to help the chapter pinpoint its specific strengths and weaknesses. The checklist enables the chapter officers to evaluate areas such as membership recruiting and retention, chapter planning and organization, chapter meetings and programs, as well as the degree of chapter participation in regional and national activities. A brief discussion on how to use the checklist and the checklist form may be found in Evaluating Chapter Performance and Chapter Evaluation Checklist (Leadership Appendix section.)

### **STEP 2: Establish Priorities**

Once your chapter has determined the specific needs of its members, and the specific strengths and weaknesses of your chapter's operation, it is time to establish priorities for an orderly plan of accomplishment. When deciding which need, problem, or task should be attacked first, several factors should be considered.

- a Which is the most critical need for urgent problem (task)?
- b Which will have the greatest impact on our chapter?
- c Does our chapter have the manpower needed to successfully attack this problem?
- d Does our chapter have the financial resources needed?
- e In which problem (or task) will the membership have the greatest interest and desire to work toward a solution?
- f When determining your chapter's priorities, it is always wise to seek the input of the entire chapter. Members will always be more willing to support priorities if they have been given the opportunity to determine them. These are best done through mail surveys, and then follow up phone call(s) to assure 90%-100% response. These results then make great discussion topics at a subsequent chapter meeting.

### **STEP 3: Set a specific Goal for Each Priority**

Once your priorities have been set, the next step is to set a specific goal for each priority. The goal establishes what you wish to achieve in relation to each priority and defines a standard of measurement. To be effective, goals must meet six standards.

They must be:

- Written
- Measurable
- Specific

**A. Goals must be written.** Writing goals is an integral part of the goal-setting process. When you place your goals in writing you help to ensure that they will be recognized and understood by every member of the chapter.

**B. Goals must be specific.** The goal must be so specific that it can be totally understood. You cannot expect the members of the chapter to actively work toward a goal that they do not understand.

**C. Goals must be measurable.** When a goal is set, it must include the standard of measurement and a specific end result. Examples of measurable goals are “the chapter will recruit a minimum of ten new members during the year” or...”our goal is to achieve a minimum of 75% attendance at each chapter meeting.”

**D. Goals must reflect progress.** Establish goals based on improving what now exists. Many of the priorities selected may not be completely reachable within one year, so set short- and long-range goals. In effect, this is part of the strategic planning process. (See details in the Strategic & Operational Planning section of the Leadership Appendix.)

**E. Goals must be realistic.** Goals should be high enough to be challenging, but not so high that the members feel they are impossible to accomplish. Goals must make your chapter “stretch” but be attainable with planned effort.

#### **STEP 4: Select Specific Projects to Achieve Each Goal.**

For each goal that is set, you will need a specific plan of action for reaching that goal. For example, if the chapter has established a goal of at least ten new members, it will be necessary to develop a very specific plan to identify and recruit those new members. These projects (detailed, sequential plans) which you develop to achieve your goals become the chapter’s programs and activities. When developing the chapter’s programs and activities, it is important to be creative and explore the various opportunities available. Don’t allow your chapter to fall into the trap of doing something just because that is the way it has always been done.

Examine your current projects and methods to see if they can be modified or improved to reach the goal. Even though you should not automatically accept last year’s programs or methods, it is also not necessary to reinvent the wheel every year. The trick is to see how they measure up, and how applicable they’ll be to helping achieve the goals for the coming year.

#### **STEP 5: Re-Evaluate Priorities, Goals and Projects.**

Good management requires that every chapter constantly know where it is in relation to where it wants to go. Officers must frequently check to see if things are on schedule. Every chapter should re-evaluate its priorities and review the success or failure of its programming at least quarterly. The chapter should never hesitate to drop a priority or project and replace it with another one that will better meet the overall mission and objectives.

Good chapter management requires that goals and projects be fine-tuned throughout the year. In some cases, it may be necessary to raise or lower a goal to properly reflect the progress to date. Or, even better yet, make the proper revision in the “action plan” so that the goals will be met! Particularly in planning for the future or in making the required “mid-course” corrections – don’t let the re-evaluation system be a “cop out.” Take a realistic look at each phase of the plan...and see what changes are necessary. Don’t change just for the sake of change. At the same time, however, don’t be so “channeled” that you ignore a change in the desires of the membership. (Tunnel vision will kill ultimate success!)

#### **STEP 6: Evaluate Annual Progress.**

When the chapter officers evaluate the year, they should ask:

- a “What was our objective and did we reach it?”
- b “What goals did we set and did we attain them?”
- c “Where did we exceed any goals and why?”
- d “And where did we miss our goals and why?”

In the planning process, specific/identifiable, measurable goals were established for each priority. The fact that our goals were measurable enables us now to evaluate our progress to date.

Too often, chapters simply list projects completed and activities participated in and call that an evaluation. If an evaluation is to be meaningful, it must concern “how well we’ve done” rather than “what we have done.” This evaluation of the results achieved vs. the original plan should be in writing.

The written report serves as a foundation for next year’s planning effort. You will learn and gain through analyzing both successes and failures. (See strategic & Operational Planning section of the Leadership Appendix for additional tips on strategic planning.)

## **Organize for Involvement**

Even the most elaborate chapter operating plan is doomed to failure if the chapter fails to organize its manpower to achieve the goals. Although the chapter officers have the primary responsibility for the management of programs and activities, the chapter will be successful only when every member is involved as an active participant. When all the work is tackled by only a few members (often the officers), the amount of time and effort required can become too great. Eventually, these once-dedicated members become discouraged and seek to end their involvement in chapter activities. They just get burned out. It is also important to remember that most members want to make a positive contribution to their chapter. If they are not given this chance, they too can become discouraged. The accomplishments of BDPA are made possible through the efforts of its volunteer leaders. Good chapter leaders can get things done. Better chapter leaders get things done through the involvement of all members who have the desire to make a positive contribution to the chapter.

Chapter officers must accept the responsibility for taking the time to teach others to manage chapter activities. It is often easier to do something yourself rather than to take the time to get others involved. However, it is important to remember that the long-term success of the chapter, and the **Organization**, depends on current leaders who invest the time and effort to train their successors. Chapter officers can take several steps to encourage greater member involvement in chapter activities. Among these are:

1. Make an effort to place every chapter member on a committee.
2. Make sure that every committee has stated duties and responsibilities. Each task assigned to a committee should make a positive contribution toward attaining a chapter goal. Avoid “make-work” projects.
3. Use committees to boost attendance at chapter meetings. Make each chairman responsible for getting committee members to every meeting.
4. Make sure that chapter communications (newsletter, etc.) reach every member, not just those who are able to attend meetings.

## **Chapter Bylaws Help**

Although every chapter is required to operate within the Bylaws of BDPA, it is important for each chapter to adopt a set of local bylaws. A properly drafted set of local bylaws can help the chapter run more efficiently by providing basic rules, regulations and policies. A brief background is provided in Chapter bylaws which is included in the Leadership Appendix section. If your chapter does not have a current set of bylaws on file, a special bylaws task force could be appointed. This group, working with the chapter officers, can then apply the “Bylaws Model” to the specifics of your chapter. After the bylaws have been defined, they should be presented to the chapter members for approval and then forwarded to BDPA. Bylaws should be reviewed periodically to ensure that they reflect the current bylaws and policies of the **Organization**.



## **NBDPA**

### **Book 2: Duties of Chapter Officers**



# Book 2

## Chapter Leadership

### Duties of the Chapter Officers

The typical BDPA chapter elects five chapter officers: the president, vice president, secretary, treasurer and membership chair. Some chapters, especially the larger ones, elect additional vice presidents who have responsibility for specific programs or chapter activities. The following is a summary of the typical duties and responsibilities of each of these elected chapter officers. Each chapter is free to structure the duties and responsibilities of each chapter officer in a way that will enable it to successfully achieve its goals and objectives. In any event, the specific duties and responsibilities of each officer should be in writing (many chapters include these in the chapter bylaws) so that there is no confusion about which officer has responsibility for a specific chapter program or activity.

### Chapter President

The chapter president is the chief executive officer of the organization. His or her role is to lead the officers and committees of the chapter. In this section, you will learn what you need to do on your first day as chapter president, understand the process and need for ongoing strategic planning, and identify the resources available to you as the chapter's leader. Finally, a specific step-by-step plan has been developed and included at the end of this chapter, which explains the president's duties each month for a one-year term of office.

### What are my basic job duties?

1. Lead the members by affecting policies & actions that make the chapter successful.
2. Preside at all chapter meetings and meetings of the executive board.
3. Serve as the ex-officio member of all chapter committees.
4. Ensure all chapter officers and committee chairmen perform their duties.
5. Serve as the representative of the Local Chapter at the National Quarterly Board Meeting.

### What should I do first?

Your job as chapter president will be to set the goals and initiatives the chapter should achieve during your term of office. You are the principal point of contact between your chapter members and the community, the state and BDPA at large.

Therefore, it is important that you first set a meeting with the other members of your executive board and review the status of the chapter, its activities, and its members. An example of an effective chapter's executive board will consist of the chapter president, vice president, secretary, treasurer, and in some cases, the membership chairperson. These individuals comprise your leadership team.

During your first meeting, review the goals and objectives you have identified for the chapter.

What do you want to accomplish during your term of office?

What is the status of the chapter?

What is the major obstacle facing the chapter?

Is there anything within the community or industry that is affecting your chapter members?

The chapter's leadership should explore these questions and more so that you can assess the immediate needs of your chapter members.

### **What should I do second?**

Review the chapter's bylaws. Bylaws are the operating document that describes the makeup of the chapter, how the chapter should operate, and who manages the chapter's activities. A vote of at least two-thirds of the chapter membership is required to make changes to the bylaws. This document will help you determine committees that need to be identified, explain the different membership opportunities, and help you understand the roles of each chapter officer.

### **When Should the Executive Board meet?**

Most successful chapter leaders recommended that the officers meet monthly to discuss the current and future state of the chapter. If possible, meeting dates should be published one year in advance. Too many times adequate advance notice is not given to officers about an upcoming meeting, and people become discouraged when there is little or no attendance. By letting your officers know about upcoming dates, even if the topic is not yet confirmed, they can work the meeting into their busy schedules.

### **How do I run an Executive Committee meeting?**

First, always remember that the chapter officers are volunteers just like you. There are numerous challenges they face daily in juggling their personal and professional life. Your executive board meetings should be well thought out and organized. Volunteers today want their experience to be meaningful and professionally rewarding; otherwise they may not want to stay involved.

The following highlights will help get you on the right track:

1. Be on time – do not start the meetings late.
2. Have an agenda of discussion topics – and stick to them.
3. Give attendees at least three weeks advance notice of a meeting date and location.
4. Schedule meetings in a consistent pattern (for example: every other Friday or second Tuesday of the month.)
5. Contact officers individually before each meeting to identify discussion topics.
6. Email the agenda prior to the meeting date so that attendees can prepare in advance.
7. Include an update of NBDPA issues and programs on the agenda at every meeting.

8. Include current financial and membership information from the treasurer and membership chair at every meeting.

### **Should minutes be taken of the meeting?**

Absolutely. There should always be a record of decisions made on behalf of the chapter, and of policies determined for future chapter actions. Your chapter secretary is responsible for keeping minutes of all official business of the executive board and any related committee or task force. Minutes do not need to be extremely detailed recordings of the discussions. Rather, they should summarize the opinions of the committee members and record the actions taken by the majority. The minutes must remain in chapter files so those subsequent officers have a history of the chapter's policies.

### **Guiding the other chapter officers**

During the first meeting of the executive board, it is important for the chapter president to review the duties and responsibilities of each chapter officer. Provide each officer with a job description that details what their responsibilities are to the chapter. Distribute copies of the chapters in this book that apply to positions held within the chapter. Review these responsibilities carefully with each officer and address any concerns they may have with their role in the chapter. This will reduce any later confusion over who is responsible for what initiatives and avoid lapses in activities.

### **How do I set up a chapter budget?**

As the chief leader of the chapter, you hold a fiscal responsibility for managing the membership dues (and other?) income of the chapter. A budget will help you to carefully manage the assets of the chapter and allow the committees to accomplish their goals through programs and services. This budget should be developed in conjunction with your chapter treasurer so that he or she is knowledgeable about the financial goals of the chapter and can provide recommendations where needed. The chapter treasurer will be responsible for reporting the financial status of the chapter at every executive board meeting.

### **How do I appoint committees and chairman?**

Developing a chapter committee structure varies from chapter to chapter, depending on the size of its membership, the scope of its volunteers, and the activities that it sponsors. Careful attention should be given to selecting your committee chairmen. They should be clearly informed as to what is expected of them, avenues of approach, timetables, budgets, available resources, and their relationship to other committees. Two recommended committees the chapter should support are a membership committee and program committee.

The membership committee implements programs and complete tasks that help retain chapter members, and recruit new ones. The chairman appointed to this committee should have a strong grasp of the industry in order to understand and identify needs of the members. The chairman should also be very personable in nature and have lots of energy. Their charge will be to make contacts with prospective members and promote the organization to National BDPA and maintenance managers who may never have heard of the **organization**.

The program committee develops and organizes all the chapter monthly educational meetings and. This committee chairperson should be well organized, highly motivated, and creative. They should work closely with the membership chairperson to identify possible new ideas for or speaking topics that would appeal to the

membership. The program chair will determine the entire year's monthly meeting schedules one year in advance. Remember that the chapter should establish a routine meeting date, such as the second Thursday of the month, so those members can remember and schedule to attend chapter events.

### **Who else should I contact during my first month in office?**

Always keep in close contact with your group director. The group director is appointed by the regional vice president (see chapter 2-BDPA Chapter Administration), and works with chapters in a specific geographical region to help plan events and develop membership action plans. They can serve as a great resource to help start your year positively. Review your meeting agenda with them before each meeting and inquire about upcoming national or regional issues that should be discussed. Be sure to include their mailing information on your database and invite them to attend all chapter functions, including the executive board meetings. The communication with your group director will ensure that your chapter's concerns are addressed at the national level. The group director reports on initiatives and challenges of chapters in their region to the regional vice president and, in some cases, to national committees for which they hold an active seat. In most cases, the group director was a chapter officer and has firsthand knowledge of how to run an effective chapter. Later in this chapter is a list of resources available to help you as a chapter president during your term of office.

### **Is there training available for chapter officers?**

Chapter leadership training is available to any chapter. Programs are held throughout the year in each region, as well as national training programs scheduled at all BDPA national conferences. It is important to send as many officers as the chapter can afford to these programs. If funds are not available from the chapter, a formal request can be made in writing to the regional vice president. Contact the National BDPA Vice President of Membership Management for more information and dates of upcoming programs.

### **What else should I remember as chapter president?**

Always thank your officers for their contributions, and recognize them at the end of their terms with a certificate of appreciation or other form of recognition. Some chapter presidents elect to save their last chapter meeting of the year to acknowledge officers for their achievement. Do not hold your praise until the very end! Be sure to thank officers and other volunteers at the end of chapter meetings for their participation and commitment to the chapter's activities. Beginning with the fall meeting of your term, consider who will lead the chapter the following year. Many chapters appoint the outgoing president as the Nominating Committee Chairman. Ensuring continuity in the Secretary and Treasurer positions (several chapters have made these positions permanent) will ultimately leave a legacy of success behind you.

### **What Resources are Available to Chapter Presidents Regional Vice President**

The RVP is an elected official who serves on the National Board of Directors for BDPA. They are elected to this position by a vote of the National Board of Directors. Election to the board is for a term of two-years. Your RVP should be informed of all your chapter initiatives, programs, events, and concerns. He or she can provide guidance when dealing with strategic planning, and can serve as a speaker for a chapter meeting. Because they serve on the national board of directors, they are in a position of reporting to you directions the national **organization** is taking for the year. Since they represent the concerns of the membership, which include your chapter members, they provide a voice at the national level to address local concerns.

### **Regional Director**

is an elected official who serves on the National Board of Directors for BDPA. They are elected to this position by a vote of the National Board of Directors. Election to the board is for a term of two-years. You're RD serves in place of the RVP in their absence and should be informed of all your chapter initiatives, programs, events,

and concerns. He or she can provide guidance when dealing with strategic planning, and can serve as a speaker for a chapter meeting. Because they serve on the national board of directors, they are in a position of reporting to you directions the national **organization** is taking for the year. Since they represent the concerns of the membership, which include your chapter members, they provide a voice at the national level to address local concerns.

**Past President of Chapter** – All of the chapter’s past presidents can provide you with input and ideas. These individuals can prove invaluable during all of your chapter strategic planning meetings. Their input and guidance can be helpful because of the experience they had with the chapter. You may identify a new program or idea that was already attempted and was not successful. Of course, other past officers and volunteers can serve as advisors to the chapter when needed.

### **National Leadership Training**

Conducted annually at annual National Conference and offered to all chapter and regional volunteer offices. Regional officers also conduct leadership development sessions.

**Internet** – The Internet is a wealth of information and ideas for chapter programs. You may want to consider designing a website to advertise your chapter activities and expose your chapter to individuals who may be interested in becoming a member. A link to your site can be provided from the NBDPA site at [www.bdpa.org](http://www.bdpa.org).

### **Strategic Planning Process**

What every President should know: before you can have a successful year you must have an intelligent plan of action. Your plan can be as detailed or as simple as you need. Every chapter can have its own direction and needs, since member interests and backgrounds can vary depending on where the chapter is located. However, the content and structure of your plan should contain the following basic headings to ensure that you are developing initiatives that best meet the needs of your members.

#### **Understand BDPA’s Mission Statement**

BDPA’s Mission Statement: To Enhance the Value and Expertise of Facility Professionals. This statement clearly defines the chapter’s principal activities and is a motivation for new activities and as a test of appropriateness for existing programs.

#### **Read and Understand the Chapter’s Bylaws**

As the chief executive officer of the chapter, it is your responsibility to understand all aspects of your chapter’s bylaws. Bylaws serve as the official governing document of the chapter. It outlines how the chapter is structured, who is responsible for the chapter’s actions, and who can belong to the chapter. *Identify a Group to develop this Plan – Ideally, if your chapter is rather large in scope and membership, you can identify a long range planning committee. This committee would be charged with developing future initiatives and targeting trends that will affect your members’ needs. If your chapter is not equipped to appoint a committee, then your Executive Committee can serve the purpose of developing an action plan. Whatever group you appoint, it is important to ensure that communication lines are constantly buzzing with information between the members and the volunteers.*

#### **Conduct a thorough Chapter Analysis**

Begin your action plan development by performing an evaluation of the chapter and the services it is providing to your members. This analysis is accomplished in several steps.

- 1 Conduct an internal environmental analysis. List all the strengths of the **organization** and the chapter. Anything the chapter does that positively affects the members, the community and the **organization** at large should be noted. Also, include a list of weaknesses the chapter faces.

Examples of a chapter weakness might include:

- a. lack of motivation by leadership
- b. poor attendance at chapter events
- c. limited resources to plan chapter events.

- 2 Conduct an external environmental analysis. List all the opportunities that are available to the chapter. An example of opportunities might include student member recruitment, regional chapter leadership training, and membership marketing to BDPA prospect lists. Include any threats that exist which will affect your chapter's initiatives. An example of a threat might include competition from other organizations.
- 3 Talk with members of other organizations and determine what actions they are currently taking as part of their annual section plan. What programs and services are they supplying to their members? How are they combating the issues of volunteer commitment?
- 4 Review all of the analysis form above and determine 2-3 primary areas that need action and strategies identified. As you review these lists, you will see primary topics that need immediate attention, such as membership or program development.
- 5 Once you have identified the primary objectives, begin detailing specific actions that will achieve those objectives. As you do this, keep the following in mind: exploit opportunities that build on strengths; protect against threats as best you can, address weaknesses immediately.
- 6 Do not forget to involve past officers, group directors, and regional directors in your planning process. They have a great sense of history and can provide a perspective you may not have realized. They can be helpful in solving problems that are new to you, but not new to them.
- 7 Discuss your final plan with NBDPA VP of Member Management staff for their input and guidance. They will have additional membership survey information that might be useful to support your ideas and can help you simplify your plan so that it is readily undertaken by your volunteers.
- 8 Once your plan has been presented to the chapter, begin developing strategies for monitoring its implementation. Follow-up with your committee chairmen on a regular basis to ensure those actions are being completed. Finally, determine whether new initiatives or directives have arisen that might cause you to modify the plan during the year.

A successful chapter is one in which leaders develop appropriate strategies, has an executive committee to implement them, and equips the members with effective systems of information, planning and reward to get the job done. The objective is to have the people in the chapter understand and share the same guiding visions and goals.

## **Chapter President Responsibilities by Month**

This list of tasks is based on officers beginning their term of office in January. You may need to modify this for terms beginning at other times of the year.

**NOTE:** BDPA Annual National Conference should always be reflected within the yearly calendar. Please adjust your checklist accordingly if the conference is held at a different time.

\*Identify why is all this going to VPMM and not VPSP?

## **January**

Review committee reports and minutes of each Executive board meeting, chapter program from last year and preside over chapter meeting. Read chapter and NBDPA Bylaws to familiarize yourself with operating procedures and make adjustments as necessary (contact NBDPA VP of Member Management.) Confer with chapter Treasurer that the annual financial report form was mailed to NBDPA. This form is due February 28th. Conduct Board and Committee Orientation – ask chairpersons and officers to submit objectives and financial needs in writing.

- Review responsibilities of each officer. Advise them of deadlines to report information to executive board.
- Review BDPA mission and vision statement
- Review chapter action plan, results of chapter evaluation, membership survey.

Confirm that the Chapter secretary mailed the Officer Report Form to NBDPA. (This is due the month officers are installed.) Develop chapter strategic plan and prepare to review it with the Executive Board. Submit a copy to NBDPA VP of Member Management. Complete chapter membership evaluation. Review the feedback and modify your action plan where needed to respond to member comments.

## **February**

Preside over the first chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Arrange for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Work closely with Program Chair to schedule all meeting dates for program year. Confirm this information is submitted to Newsletter Editor for publishing to chapter membership. Work closely with the Program Chair to plan the first monthly meeting to ensure all information required for promotion is provided one month in advance of meeting date. Ask Treasurer of Finance Committee to present the year's budget at the next executive board meeting. This report should be based upon the financial needs reported by the committee chairman. Confer with program chair that all meeting dates are scheduled and advertised to members for remainder of the year.

## **March**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Arrange for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Conduct executive board meeting Review committee reports Ask membership chair to provide status reports on membership recruitment and retention plan. Determine the assistance needed to complete the tasks as outlined.

## **April**

Conduct Executive Board meeting and review committee reports. Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Arrange for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Announce membership plans and goals at executive board meeting. Request the program chair provide a written report of success/feedback from chapter monthly meetings for Executive board meeting. Follow-up with Chapter Treasurer to confirm status of chapter communications. Provide any assistance as needed. If chapter's gross receipts are \$25,000 or more, remind Chapter Secretary and Treasurer of the necessity for arranging annual audit in June and completing IRS Tax Form 990 for current fiscal year.

## **May**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.
- Conduct Executive Board meeting and review committee reports.



Discuss the current financial status of the chapter with Chapter treasurer. Make contact with other chapter presidents in surrounding area. Explore the idea of a joint meeting or social event.

## **June**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Conduct executive board meeting and review progress reports from committees. Give information to the newsletter editor to disseminate to members. Assign the Chapter Secretary the duty of completing the nomination forms and returning to NBDPA. Being planning for mid-year regional meeting (if applicable) Confirm that the Vice President has prepared a submission for Chapter of the Year. This award nomination is due late July 1st.

## **July**

Preside over chapter monthly meetings.

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Conduct Executive Board meeting and review committee reports. Determine who will represent the chapter at the BDPA Board of Directors meeting and confirm that reservations have been made to attend.

## **August**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.

- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Conduct Executive Board meeting and review committee reports. Confirm plans for Board of Directors representative to attend Annual BDPA National Conference. Ask chapter membership chair to provide status report on membership standing and upcoming recruitment campaigns. Review current finances with Chapter Treasurer and determine projected net income for remainder of the year.

## **September**

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Conduct Executive Board meeting and review committee reports. Encourage vice President to begin selecting next year's leadership team. Discuss the nominations process. Attend BDPA Annual National Conference and chapter officer leadership training.

## **October**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.
- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Prepare outgoing speech Prepare letter to members summarizing the year's activities. Follow-up with Vice President to confirm chapter awards/certificates/plaques were ordered for chapter officer awards. Take first round of nominations for next year's leaders.

## **November**

Preside over chapter monthly meeting

- Develop 5-minute talking points about BDPA initiatives.
- Make arrangements for meeting space, head table, etc.

- Choose someone from membership with special knowledge of the speaker's subject and have them thank the speaker.
- Announce dates for any other related BDPA meetings and promote upcoming chapter/national meetings.

Report on chapter officer leadership training held at Annual BDPA National Conference and other significant issues from regional/national board meetings (if Vice President is unable.) If chapter's gross receipts are \$25,000 or more, file IRS Form 990 by November 15. Announce award recipients of chapter recognition programs at holiday meeting. Remind awards/nominations committee to send members an announcement of local chapter awards. Close nominations and vote in next year's leaders.

## **December**

Preside over chapter meeting and install new leaders. Wish Vice President and incoming executive board the best by helping to transition the leadership and turn over all-important chapter documents, records and resources.

## **Chapter Vice President**

The chapter vice president is the second in command of the organization. It is their role to assist the president in fulfilling their job duties. This officer will assume the duties of the president in his or her absence, so the vice president must be familiar with their responsibilities. In this section, you learn what you need to do on your first day as chapter vice president, understand the importance of running effective committee meetings, and understand the role you play in developing the membership of the chapter. Finally, a specific step-by-step plan has been developed at the end of this chapter explaining the vice president's duties each month for a one-year term of office.

### **What are my basic job duties?**

1. Assume the duties of the president in his/her absence.
2. Serve as the chairperson for the chapter programs committee.
3. Oversee the membership committee.

### **What should I do first?**

Your role is to assist the chapter's president should he/she be unable to fulfill the duties of their term. This is also the time when you should begin identifying the actions and initiatives you hope to accomplish during your term as president. It is important that you make every attempt to attend as many committee meetings as possible. While you will want to ensure that chapter actions are being carried out, it is also important to spend time evaluating the volunteer officers to determine if changes need to be made for next year. During your first month on the job, you need to review the committee reports and board actions from last year's meetings. Be sure to familiarize yourself with actions taken, programs planned, and the specific issues addressed by the board. Having this historical knowledge will allow you to guide the chapter in the next year and continue

capitalizing on the successes achieved from the year prior. You should also assist the chapter president with the completion of a chapter evaluation. Send an annual survey to every chapter member asking them to evaluate the programs offered and identify new topics for the program committee to consider. This survey should also help target immediate concerns expressed by the membership. A summary of these evaluations should be given to all officers of the Executive board and any related committee.

### **What should I do then?**

Review the chapter's bylaws. Bylaws are the operating document that describes the make up the chapter, how the chapter operates, and who manages the chapter's activities. Changes to this document can only be done through a vote of the entire chapter membership. This document will help you determine committees that need to be identified, explain the different membership opportunities, and help you understand the roles of each chapter officer.

### **Guiding other chapter volunteers**

Train committee chairmen how to conduct effective meetings. It is recommended that you, in conjunction with the chapter president, provide each committee chairperson a written job description detailing their responsibilities to the chapter. You may also distribute copies of pertinent chapters in this book that apply to their positions and responsibilities. Review these responsibilities carefully with each committee chairperson and address any concerns they may have with respect to their role in the chapter. This will reduce any later confusion over who is responsible for what initiatives. It will also avoid potential lapses in activities and deadlines.

### **Who else should I contact in my first months of office?**

Begin contacting other vice presidents in surrounding chapters to review issues and concerns of chapters around you. You will be surprised to learn that many other chapters share the same concerns and challenges. Learn from your counterparts what they have done to create value within the chapter membership. Building this network will be helpful when you take office as chapter president. Talk with other chapter leaders and explore the opportunities for joint programming. This is an excellent method of sharing resources while keeping your expenses to a minimum.

**President-elects move into office, vice presidents are elected each term**

### **Is there training available for chapter officers?**

Chapter leadership training is available to any chapter. Programs are held throughout the year in each region, as well as national training programs scheduled at BDPA national conferences. It is important to send as many officers as the chapter can afford to these programs. If funds are not available from the chapter, a formal request can be made in writing to the regional vice president. Contact the NBDPA VP of Member Management for more information and dates of upcoming programs.

### **If the President guides the Executive Board, who do I motivate?**

You are responsible for directing the actions of the program committee. This is a very important job, since developing quality educational meetings and valuable networking events for chapter members is the very reason why the chapter exists. This committee is responsible for planning and executing the monthly meetings, and special events for the chapter. While there may be a chairperson for the committee, your job is to ensure the committee is meeting the needs of members and organizing professional rewarding activities.

### **What else do I need to do?**

As Vice President, you should encourage committee chairmen to take initiative to create new ideas and new programs when a chapter need is identified. Having the initiative to identify problem areas will help ensure that your chapter remains successful. It is also important to keep your ears open to member concerns, as well as volunteer complaints. Listening to your members very carefully will help you respond directly to their needs. It is how quickly and effectively you listen and respond that will ensure that your members continue to support the chapter and renew their dues.

However, most importantly, listen to your volunteers, and provide them all the resources available to do their jobs successfully. These could be the people who serve you as president. Giving them guidance and excellent training now will only ensure a more successful future next year.

### **Managing a Successful Committee**

Many people pay too little attention to practices that can make meetings effective. In an age when recruiting volunteers is more and more difficult, it is important to ensure that the time the volunteer has invested is valuable and worthwhile. That is why it is important to make meetings effective and productive. A meeting is simply not an agenda – it is a coordinated process designed to achieve specific outcomes. An effective meeting encourages input from all members, discussed trends, issues affecting the chapter, and results in decisions and direction. Committee members' actions encourage high attendance, consistent involvement, and successful working relationships. It is important that you take time to orient the committee chairs to their responsibilities. This may be the first time they have ever chaired a committee, or even become involved in any organization!

They will need guidance from their executive leaders, and need to understand some basics. The following steps will help create effective meetings: Plan the agenda in advance and distribute it to committee members at least a week before the meeting. This will give members time to understand what issues are being discussed, what actions they will be expected to report on, and what information they will need to bring with them. Spread out the workload as much as possible. If the same few members handle all the responsibility, they run the risk of tiring out and leaving the committee. In addition, those that do not have a chance of participating will feel that their participation is not valued. Stick to the topics on the agenda. Do not waste your volunteers' time by straying too far on unrelated issues. Focus on the tasks at hand. Give adequate notice.

Many people do not have flexible schedules and need at least 2-3 weeks' notice of a meeting. It is also highly recommended that the chapters meeting schedule be set a year in advance so that individuals can work their schedules around committee days.

Share information in advance of the meeting. It is never more frustrating to a volunteer to receive a stack of papers to read and comment on the day of the meeting. Give them time to digest the material so that they are prepared to discuss it. Keep the momentum and energy going. Take a break when necessary. In addition, keep the meeting light – remember, this is supposed to be fun! Create standard procedures for informing members about committee actions and ideas. They too, appreciate the input and want to see what their chapter is doing on their behalf. Just like NBDPA, you may want to consider hosting an annual meeting for your chapter. A yearly meeting can provide a forum for your members to hear what actions are being pursued and to provide input on major chapter ideas and initiatives. This will help strengthen the commitment of your members come membership renewal time!

Another communication vehicle to consider is producing an annual report. Your members are dues paying stakeholders in the chapter – you work on their behalf to spend their money wisely on activities and events that benefit them. Show them on paper what you accomplished on their behalf during the year and encourage them to continue their support in the coming year. In this document, you can include goals and objectives for the chapter, highlight the progress made on these goals, and describe projects and activities that the chapter

implemented. It will also provide the incoming officers with a snapshot view of the chapter, which will be useful during the planning stages of their administration.

## **Chapter Vice President Responsibilities by Month**

This list of tasks is based on an officer beginning their term of office in January. You may need to modify this for terms beginning at a different time of year.

**NOTE: The Annual BDPA National Conference** is held in the fall annually. Please adjust your checklist accordingly if the conference is held at a different time.

### **January**

- Review committee reports and minutes of each Executive Board meeting, chapter program from last year.
- Prepare for board/committee orientation meeting next month.
- Assist chapter president with completion of chapter evaluation by membership. Use the feedback gained to develop chapter action plan for following year.
- Work with the program chair to plan the first monthly meeting and ensure that all the information required for promotional mailings is provided to the newsletter editor or chapter secretary.

### **February**

- Assist Chapter President with the development of chapter strategic plan for current year.
- Attend the Board and Committee orientation
- Attend first chapter monthly meeting and provide a critique of the meeting to the executive board.

### **March**

- Attend Executive Board meeting.
- Work with Chapter Membership chair and committee to assist with the development of membership renewal campaign.
- Contact other chapter vice presidents for feedback, ideas and other planning initiatives they are pursuing.

### **April**

- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.
- Chapter of the Year application forms will arrive in the April VIP.

### **May**

- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.

## June

- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.
- Begin formulating ideas for chapter volunteer's nominations. Review action plans needed and identify committee needs and areas of weakness to be improved.
- Mail Chapter of the Year nomination to NBDPA, due July 1st.

## July

- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.

## August

- Attend the Annual BDPA National Conference.
- Attend National Board of Directors meeting.
- Survey the chapter membership to determine new program ideas, interest in serving as a volunteer, and individual members' view about how the chapter could better serve their needs.
- Make plans to attend the chapter leadership training program at the Annual BDPA National Conference.

## September

- Attend chapter officer leadership training.
  - **Attend regional meeting during the conference (if applicable.)**
- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.
- Review the chapter nominations process as outlined in chapter bylaws and prepare a nomination request to be sent to chapter members.

## October

- Report chapter officer leadership training and other significant issues discussed at Annual BDPA National Conference. Prepare a written report to the newsletter editor for publication to the membership.
- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.
- Review nominations received for officer and committee volunteers.

## November

- Attend chapter monthly meeting and provide a critique of the meeting to the executive board.
- Attend Executive Board meeting.
- Finalize the chapter action plan for the coming year and review it with NBDPA to ensure that initiatives support national drives.
- Prepare the board and committee officer orientation program to train incoming officers. Mail the meeting notice 4 weeks prior to the meeting date.
- Begin preparations for completing the chapter evaluation form.

## December

- Wish new Vice President and incoming executive board the best by helping to transition the leadership and turn over all important chapter documents, records and resources.

## Chapter Secretary

The chapter secretary is responsible for maintaining all chapter records, history, member lists, reports, and official business of the executive board. You are also responsible for disseminating information between NBDPA and the region in which the chapter is located. Any correspondence to be sent to members, **organization** leaders, or the community-at-large is under the jurisdiction of the chapter secretary. Finally, you also handle all orders of chapter stationary, award plaques, and other chapter supplies. In this section, you will learn what you need to do on your first day as chapter secretary. Information is also included to teach you how to maintain good accurate chapter records. Finally, a specific step-by-step plan has been developed explaining the secretary's duties each month for a one-year term of office.

### What do I do first?

Your first primary responsibility is to send NBDPA the officer report form (please refer to the end of this section.) This form tells NBDPA who the new chapter leaders are and ensures they are placed on the mailing list for all national correspondence. This form is due to NBDPA the first month the officers begin their term.

### What are my main responsibilities as secretary?

Your primary responsibilities can be summarized into three categories;

1. Maintaining records – maintain historical documentation of events held
2. General meeting data
3. Educational events, social outings, and any other business of the chapter.

This information will serve a vital role for the officers who succeed you. They will have a quick snapshot of the chapter's activities and can review records to see how successful and well received various program ideas were.

### Keeping minutes

minutes should include items discussed during any official executive committee meeting and/or board meeting. You should make sure to highlight any items that required a decision and what the outcome resulted in. A synopsis should be included in the next membership newsletter or other communication.

### Correspondence

Be a facilitator of general communications. If a thank you letter needs to be written and sent to the host or to a speaker of an event, this is your responsibility. These items would be at the direction of the president or vice president.



### **Am I responsible for managing the chapter newsletter?**

In some cases, the chapter secretary also serves as the chapter newsletter editor. Your role in this project is to produce and mail a chapter newsletter to members, along with meeting notices and event promotions of upcoming events. That is why it is important that accurate listings of chapter members, their addresses, and telephone numbers be kept on file with the chapter and NBDPA.

### **What role do I play in membership of the chapter?**

The chapter secretary must work closely with the membership committee, and/or membership chairman, to keep accurate records of new members joining the chapter. The secretary has primary responsibility for maintaining the chapter membership roster. Frequent communication with the NBDPA membership department will ensure records are accurate. In addition, if a member changes their mailing address, employer, or any other change to their membership information, the secretary must notify NBDPA and the chapter membership chairman.

You can also assist the chapter membership chairman to maintain a list of National BDPA in your community who are not members. NBDPA can supply you with a list of those individuals who have contacted BDPA for membership information, but have not yet joined. Also ensure that these prospective members receive meeting announcements.

### **Who coordinates the development of a membership directory?**

In larger chapters, this position may be responsible for the development of a chapter member directory. Directories are printed to include membership information as well as advertisements from local chapter sponsors. By selling advertisements and listings in your chapter directory, it can serve as a great fund-raiser for a chapter. Please refer to chapter 9 – Getting the Word Out, for more detailed information about how to develop a chapter directory.

### **What is the proper use of BDPA's name and logo on all correspondence?**

When sending out any chapter correspondence, whether it is a thank you letter to a sponsor, a solicitation letter to a prospective member, or simply minutes from a chapter meeting, the proper use of BDPA's name and logo must be adhered to. The official name of the organization.

In all official chapter business, the official name of the chapter should always be used, which can be found on the first page of your chapter's bylaws. The name of the chapter should be stated as such: BDPA – (name of chapter) **Chapter (#of your chapter.)** For instance, if your chapter is located in Sun City, Florida, your official chapter name, as listed on your chapter bylaws, is "Blue Wave #585". Therefore, on all chapters' official name as BDPA's "tag line" **To Learn, Lead an influence should not be stated any other way.**

### **If the chapter is submitting a nomination for a national award, who organizes this?**

The Chapter Secretary will work with the chapter vice president to write and submit nomination forms for BDPA national awards such as **the FAME, Fellow**, and Chapter of the Year programs.

## Ordering Chapter Supplies/Stationery/Plaques Customized Chapter Stationary

As the chapter secretary, you assume the duties of ordering supplies for your chapter. **NBDPA has arrangements with local printers to reproduce customized letterhead and envelopes that you may use for all chapter correspondence.**

NOTE: any use of the BDPA logo and/or name must be used in a format approved by NBDPA.

### Chapter Plaques

You are not limited to using these plaques for an outgoing chapter president. They can be engraved with any information you choose, whether you are presenting an award to a chapter member, or honoring a longtime sponsor of the chapter. **Please check the BDPA web site, [www.BDPA.org](http://www.BDPA.org) for ordering information from our current vendor.**

NOTE: that it can take up to three weeks for a plaque to be ordered and delivered to your door. Be sure to plan in advance so that it is ready when you need it.

### Chapter Supplies

**NBDPA will send printed marketing materials at no charge.** Numerous publications and technical reference materials, including reprints of several BDPA Journal articles, are also available for purchase for your chapter members. These items are available through the NBDPA Communications department.

Please refer to the BDPA Technical Resources Guide for a complete listing of available materials.

### How to Order Chapter Stationary

Chapter stationery includes letterhead, envelopes, and business cards. **To place an order you may send a letter, email, fax, or call the NBDPA VP of Member Management.** Include the specific information you would like included on your letterhead. Indicate the quantity of stationary and envelopes needed. Typically, chapters order in quantities of 500 or more.

### Chapter Secretary Responsibilities by Month

This list of tasks is based on an officer beginning their term of office in January. You may need to modify this for terms beginning a different time of year.

NOTE: **The Annual BDPA National Conference**, is held in the fall annually. Please adjust your checklist accordingly if the conference is held at a different time.

#### January

- Mail to NBDPA
- Chapter Officer Report Form (due the month officers are installed.)

- Executive board minutes
- Completed chapter evaluation
- Mail meeting notice to members for February chapter meeting

#### **February**

- Mail to NBDPA
- Chapter's strategic plan
- Minutes from January Executive Board meeting
- Completed chapter year-end evaluation
- Mail meeting notice to members for March chapter meeting
- Attend first chapter monthly meeting
- Attend Board and Committee Orientation hosted by the region (if applicable.)

#### **March**

- Attend chapter executive board meeting
- Mail meeting notice to members for April chapter meeting
- Have thank-you letters sent to the meeting host and speaker within three days after the February chapter meeting.

#### **April**

- Attend chapter executive board meeting
- Attend chapter monthly meeting
- Mail meeting notice to members for May chapter meeting
- Work with chapter president/vice president to complete awards, check deadline date.
- Send thank-you letters to meeting host and speaker within three days after meeting.

#### **May**

- Attend chapter executive board meeting
- Mail meeting notice to members for June chapter meeting
- Attend chapter monthly meeting
- Send thank-you letters sent to meeting sponsors and speakers three days after chapter meeting.

#### **June**

- Attend chapter executive board meeting
- Mail meeting notice to members for July chapter meeting
- Attend chapter monthly meeting.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.

#### **July**

- Attend chapter executive board meeting
- Mail meeting notice to members for August chapter meeting
- Attend chapter monthly meeting.
- Make preparations to attend Chapter Leadership Training held at Annual BDPA National Conference.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.

#### **August**

- Annual BDPA National Conference
- Attend National Board of Directors meeting.
- Attend Chapter Leadership training.
- Mail meeting notice to members for September chapter meeting
- Attend chapter monthly meeting.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.

### **September**

- Attend chapter executive board meeting.
- Mail meeting notice to members for October chapter meeting.
- Attend chapter monthly meeting.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.
- Attend regional meeting (where applicable) and report on actions in next mailing.

### **October**

- Attend chapter executive board meeting.
- Mail meeting notice to members for November chapter meeting.
- Attend chapter monthly meeting.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.
- Write synopsis of Annual BDPA National Conference activities, training, and regional meetings (where applicable) and give to newsletter editor for inclusion in next month membership mailing.
- Provide copy to membership chair to use in any communications to members.
- Order chapter award/certificate/pins from NBDPA for local nominees to be presented at chapter awards program in December.
- Mail call for nominations/volunteer committee sign-up forms to chapter members.

### **November**

- Attend chapter executive board meeting.
- Mail meeting notice to members for December chapter meeting
- Attend chapter monthly meeting.
- Send thank-you letters to meeting sponsors and speakers three days after meeting.

### **December**

- Mail meeting notice for January meeting.
- Review all chapter history, correspondence, and monthly duties with new, incoming chapter secretary.

## **Chapter Treasurer**

The chapter treasurer is responsible for maintaining the financial records of the chapter. This position has the responsibility to manage the Chapter's funds and make recommendations to the Board on any expenditure that may put the chapter in financial jeopardy.

Any correspondence that is of a fiscal related nature must be approved through the chapter treasurer. In this section, you will learn what you need to do on your first day as chapter treasurer. You will also learn about

chapter dues and how they are managed, tax issues, you need to be aware of, and who is responsible for the different aspects of the chapter's finances.

Finally, a specific step-by-step plan has been developed at the end of this chapter explaining the treasurer's duties each month for a one-year term of office.

### **What do I do first?**

Send the Chapter Annual Financial Data Form to the NBDPA VP of Member Management. This form provides BDPA information of the financial stability of the chapter and is necessary for sending quarterly member dues checks (see below for more information on chapter dues.)

### **What should I do next?**

It is important to establish a finance committee that will work with you to monitor the expenses and revenues of the chapter and recommend financial changes that will help grow the chapter. The finance committee can be comprised of a separate group of volunteers, or it can simply be the executive committee.

If no finance committee is established, then the Treasurer, in coordination with the chapter President and Vice President should be responsible for the establishment of the annual budget. A budget is a financial representation of the chapter's annual strategic plan. Committees should be informed as to the parameters designed for individual activities. Once a budget has been established, it must be presented before the full board for approval.

### **Is there paperwork that the treasurer is responsible to complete?**

The Treasurer is expected to make a monthly financial report at each Executive Board meeting to keep the officers informed of the chapter's current financial status. Remember, you are managing the monies of individuals who have "loaned" dues to the chapter.

You must consider the chapter a small business, and treat it as such by operating in a fiscally responsible way. Record keeping of all expenses and income should be handled through the treasurer, or some cases a finance committee, depending on the chapter's size.

At the end of the BDPA fiscal year, which runs January 1 through December 31, the Chapter Financial Data Form is to be sent in to NBDPA VP of Member Management. This paperwork is needed in order for the national **organization** to complete its auditing and financial reporting. A sheet has been provided for you to use as a guide. Some chapters have elected to use computer software programs to record their expenditures. In this case, you do not have to use the form provided as long as your financial report contains the same information.

### **How should the chapter organize its funds?**

As treasurer, you have the fiduciary duty to preserve and protect the assets of the chapter. Therefore, keeping the chapter's revenues in FDIC-insured bank checking and savings accounts is required. Signature authority must be granted to at least two chapter officers. It is recommended that the chapter treasurer and chapter president serve as signature authorities.

## **Who can write checks on behalf of the chapter?**

It is important to understand the responsibility the chapter officer's share in managing the funds of the chapter. You are managing the funds contributed by chapter members, and as such, you hold sole liability for the appropriate use and investment of this money.

The chapter finance committee, in conjunction with the Executive Board, might consider the following policy for writing chapter checks:

- Allow the chapter president authority to write checks on his/her own authority not to exceed \$100.00
- Checks written in the amount not to exceed \$1,000 can be written under the authority of the chapter treasurer, as long as written back-up documentation (receipts, invoices, etc.) is attached.
- Checks written for amounts exceeding \$1,000 require approval of the Executive Board and the signatures of chapter treasurer and chapter president. The board approval must be noted in chapter minutes.

## **Should the chapter simply maintain one checking account for all chapter finances?**

This depends on the level of activity by the chapter. If the chapter is rather small in size and scope, a checking account can be the simplest method of managing the minor expenses associated with building a new chapter.

However, if the chapter is well established, you should consider opening different accounts for each activity your chapter sponsors. For instance, the chapter might consider opening an account with a high interest yield for collection of contributions made for scholarships. If the chapter sponsors a local trade show, separate accounts should be maintained, with appropriate signature authority as specified above, for the expenses and revenues associated with such an event. This avoids any concern that membership dues or other chapter revenues might be integrated with funds derived from the trade show.

## **How are chapter's dues distributed?**

Members are billed for annual national, regional and chapter membership dues on the anniversary date their membership began. A quarterly dues check is mailed to the chapter treasurer by the NBDPA office. All chapters who have submitted their year-end financial summary report form will receive their quarterly payments.

This check will contain dues money that has been received in BDPA's office from the prior three months. For more information on chapter dues, please contact NBDPA's Director of Finance and Administration.

## **Can our chapter raise our chapter dues?**

Once a year the chapter can file a motion to increase or decrease their chapter dues. A chapter cannot increase its dues without a vote from the entire chapter membership.

Chapters must notify NBDPA by October 31 for a dues increase to start in January of the following year. To change your chapter dues, following the following basic steps:

1. Hold a meeting with the Executive Committee and Finance Committee (where applicable) and approve a board motion to increase dues. A specific amount must be voted on and disclosed to chapter members.
2. Contact NBDPA VP of Member Management and alert them of the chapter's decision to increase chapter dues.
3. Conduct a mailing to all chapter members, quoting Bylaws of the requirement that notice is given to members of dues increase. Check your chapter's bylaws to determine if a timeframe is specified for mailing this notification.
4. Enclose a response form for members to register their vote for the increase.
5. Tally the votes and announce to the membership the results of that vote.

Raising chapter dues can have serious repercussions on the stability and long-term growth of the chapter and its membership. It is highly recommended that this decision be discussed with your group director and regional vice president. This will ensure that the chapter received objective commentary on the opportunities, and pitfalls that may result from such a decision.

#### **Do I have to be concerned with taxes owed for the chapter?**

In some cases where the chapter has money invested in reserves, this officer serves the role of managing these funds and ensuring the chapter future. With this comes the responsibility of filing the proper tax forms and financial reports as required by state law.

The NBDPA is recognized by the Internal Revenue service as a not-for-profit membership organization and is therefore exempt from paying federal income tax under section 501©(6) of the Internal Revenue Code. The **Organization** does not support a group exemption number, which would entitle local chapters to be included under the national organization's exemption. Therefore, each chapter must seek exemption under the IRS Code. Local chapter treasurers should contact BDPA's Chief Financial Officer with specific questions about tax exemption.

#### **What is an EIN number and should the chapter obtain one?**

Each local chapter must have its own Employer Identification Number (EIN) and report this number to NBDPA for record keeping purposes. This number should be used on all correspondence and tax returns filed with federal and state authorities.

#### **UNDER NO CIRCUMSTANCES SHOULD A CHAPTER USE AN INDIVIDUAL'S SOCIAL SECURITY NUMBER TO HANDLE/REGISTER CHAPTER FINANCES.**

Chapters should not use BDPA national's EIN number on any local chapter tax returns or correspondence. New chapters which have not yet applied for an EIN number should do so by completing the feral Form SS-4 as soon as possible. This form may be obtained by contacting the NBDPA VP of Member Management.

## **Does the chapter have to file tax forms with the IRS?**

Local chapters whose annual gross receipts (money accumulated during the year) are normally more than \$25,000 must file tax form 990 every year. NOTE: chapters whose gross receipts are equal to \$25,000 or less are not required to file a return. The Form 990 must be filed by the 15th day of the 5th month after the chapter's accounting period ends. For example: chapters with a year-end of December 31 must file Form 990 by the following May 15. Late filing can result in severe penalties.

For general information and guidance, please contact BDPA's Chief Financial Officer. Chapters with income of \$25,000+ may consider garnering the services of an attorney for tax and incorporation issues.

## **Chapter Treasurer Responsibilities by Month**

This list of tasks is based on an officer beginning their term of office in January. You may need to modify this for terms beginning a different time of year.

NOTE: The Annual BDPA National Conference is held annually in the fall. Please adjust your checklist accordingly if the conference is held at a different time.

### **January**

- Attend chapter executive board meeting and give year-end financial report.
- Work with Chapter President to identify finance committee.
- Develop chapter budget for the year and submit to Executive Board for review and approval.

### **February**

- Hold first meeting of finance committee to review chapter financial status.
- Attend Board and Committee Orientation hosted by chapter president (where applicable.)
- Attend chapter executive board meeting and present chapter budget for approval.
- Attend first chapter monthly meeting.

### **March**

- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

### **April**

- Hold chapter finance committee meeting to review current chapter financial status.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

### **May**

- Attend chapter executive board meeting and give financial report.



- Attend chapter monthly meeting.

#### **June**

- Hold chapter finance committee meeting to review current chapter financial status.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **July**

- Prepare to attend Chapter Officer Leadership Training held during Annual BDPA National Conference.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **August**

- Annual BDPA National Conference
- Attend National Board of Directors meeting.
- Hold chapter finance committee meeting to review current chapter financial status.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **September**

- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **October**

- Hold chapter finance committee meeting to review current chapter financial status.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **November**

- If chapter's gross receipts are \$25,000 or more, file IRS Form 990 by November 15.
- Attend chapter executive board meeting and give financial report.
- Attend chapter monthly meeting.

#### **December**

- Hold last chapter finance committee meeting and review chapter's financial status at year's end.
- Mail end of year financial form to NBDPA due January 31.

#### **Responsibilities of a Chapter Vice President Membership Management:**

Reports to the chapter president and chairs the chapter's membership committee. Recommends to the chapter president annual goals and objectives for membership retention and new member recruitment Leads implementation of plans in support of national and regional membership goals Coordinates membership activities within the chapter Coordinates follow-up contact with Prospective Members Introduces new members at each chapter meeting and event Channels ideas for action to regional membership chairman provides general support to other chapter officers in their efforts to provide quality programs and services Participates in local trade shows and conferences to recruit new members.

## Book 3

### Leading & Managing Effective Committees

The health of any chapter can be determined by reviewing the strength of its committees. It is through the involvement of members on committees that programs are organized, education events are assembled, membership campaigns are implemented, and actions are presented to the board of directors.

Effective committees unify, represent, motivate, coordinate, consolidate and communicate on behalf of the chapter and its members. They can also provide a solid training platform for future leaders of the chapter. Good meetings generate quality decisions, a sense of direction, and provide involvement opportunities for members who may not have the time to devote to being an officer.

However, it is important for a chapter to maintain at least one separate committee so that the officers are not saddled with the tasks of managing the day to day of the chapter's operations.

Sample committees that a chapter president may appoint would include programs, education, trade show, legislative, nominations, finance, public relations, etc.

#### How are Committees established in the Chapter?

Each year the president should appoint the members and chairs of all standing committees. He or she should consult with the current chairs and other leaders in the chapter and region when making these decisions. The term of a committee chair is usually one year. Chapter presidents may renew individual terms on a case-by case basis depending on the levels of enthusiasm and effectiveness. Terms should be addressed in the chapter's By Laws.

Typically, the role of the committee is to implement the actions and specific tasks as set forth by the board during their annual strategic planning session. The committee shares the responsibility of corresponding to the board any actions taken or recommendations for discussion. A committee should be staffed by a volunteer chairperson who has some leadership experience in directing groups of individuals. It will be the responsibility of the chair to develop an agenda for each meeting, understand the tasks place before the committee, conduct the meetings of the committee, and be able to prioritize the committee's actions.

#### What is the Responsibility of a Committee?

During the chapter's strategic planning process, a list of committee actions should be identified for the committee to accomplish during the year. If no strategic planning meeting is held, then the chapter Board of Directors should identify the committee charges. These charges may change year after year as the

membership changes, or the industry changes, so these tasks need to be evaluated during the chapter's annual strategic review process. A committee may not commit an expenditure of funds, nor represent a position on behalf of the chapter, unless it has been specifically authorized to do so by the Board of Directors.

If a committee wants to host a function that would entail the use of chapter money, the committee must present a program description and budget to the board for approval. The committee is also responsible for taking notes or minutes of all meetings and submitting them to the chapter secretary for file.

### **Who Monitors the Actions of a Committee?**

While the committee is presided over by the chairperson, your chapter may choose to have a member of the Board of Directors attend each committee meeting. Having a member of the board in attendance helps guide the committee, provide feedback to the chairperson, and serve as general resource on discussion topics. The secretary of the chapter monitors actions of the Executive Board. They are responsible for maintaining all chapter records, history, member lists, reports, and official business of the executive board. He or she may also have primary responsibility for disseminating information between NBDPA and the region in which the chapter is located. Any correspondence that is required to be sent to members, **organization** leaders, or the community-at-large is under the jurisdiction of the chapter secretary. \*See chapter 5 for additional duties assigned to the secretary.

### **How should committee actions be recorded?**

Minutes should be completed after every committee meeting and submitted to NBDPA in the chapter's history file. The minutes should include items discussed during any official executive committee meeting and/or board meeting. Care should be taken to highlight any items that required a decision and what the outcome resulted in.

A synopsis should be included in the next membership newsletter or other communication to members. A sample copy of a committee report form has been included as a reference guide for recording actions from a committee.

### **How Do I Develop a Committee Agenda?**

Today's volunteer has limited time to spend on extracurricular activities. For any volunteer experience, he/she wants their time spent to be a valuable experience. Here are some guidelines you can follow to ensure that committee meetings are productive and useful of your volunteers' time.

- Provide an agenda sheet with beginning and ending times for the meeting. Include the location of the meeting, a list of the committee members, and the topics to be discussed. Include the identity of any member who will be scheduled to make any specific contribution to the meeting.
- Schedule your planning so that plenty of advance notice is sent to members. A minimum of three weeks is usually ample time for people to plan to attend.
- Send the agenda out prior to the meeting so the members have time to review discussion topics and prepare whatever reports and information they feel might be needed.
- Sequence agenda items thoughtfully. Start the meeting with topics that will unify the committee, and help them work together. Do not put difficult items back-to-back. People need a break. Be sure to build in time for breaks. Finally, end the meeting with a topic that will unify the committee so that people leave the meeting believing they have accomplished something for the time spent.

- Provide written background information for each agenda item where necessary.
- Identify the person who is responsible for reporting on each item.
- Consider including time for regional representatives to speak on regional and national items of interest. This will keep committee members informed of actions and items of interest that might be forthcoming.

## **Do's and Don'ts for the Committee Chairman**

### **Do's:**

- 1 Develop a work plan that explains what the committee's tasks are for the year.
- 2 Develop agendas and conduct productive meetings.
- 3 Approve the report of the committee before it is disseminated to the chapter secretary, president, regional directors and BDPA staff.
- 4 Report to the chapter officers on decisions and actions the committee would like to take.
- 5 Recruit new volunteers and interested members to serve on your committee.
- 6 Where appropriate, guide the committee in proposing services and programs that will further the goals and mission of the chapter.
- 7 Be aware of the feelings of members and look for visual clues that a member is not happy. Remember – committee participants are also members – keeping members happy will keep your chapter running smoothly.
- 8 End the meeting by thanking everyone for participating and noting the date and time for the next meeting.

### **Don't:**

- 1 Do not monopolize the discussion.
- 2 Be a facilitator of the meeting and encourage input from all members.
- 3 Encourage clashes of personalities – encourage the clash of ideas. Good decisions come when all committee members have examined all sides of an issue.
- 4 Permit one-sided discussions – ensure that all members enjoy being heard at all times.
- 5 Directly ask members for their opinions and thoughts to ensure they are encouraged to provide input.
- 6 Do not allow talkative members to spin the committee off-track. Always monitor participation and draw out silent members.
- 7 Always look for a unanimous decision. Seeking a consensus is fine – you won't always get a unanimous vote.
- 8 Ignore the committee's agenda – If a topic is raised that does not relate to the discussion, control the meeting by indicating this item will be discussed at the end of the agenda under "new business." This will keep your committee members more focused.

## **Chapter Committees**

Every chapter is encouraged to make maximum use of committees to achieve the goals and objectives of the chapter. Committees help to spread the burden of work among the members of the chapter and provide excellent opportunities for chapter members to be actively involved in the projects and activities of the chapter. The bylaws of most chapters provide for one or more "standing" committees.

The duties of these committees may be specified in the bylaws. The chapter president is required to appoint a committee chairman immediately after assuming office. Minimally, the three most common standing committees are the nominating committee, the membership committee, and the program committee.

### **Membership Committee**

To provide a brief example of items contained in a “committee charge”, here is an overview of typical membership committee activities.

In most chapters, the membership committee is responsible for all membership recruiting and retention activities. This involves: inputting annual plans for membership recruiting and retention; contacting prospective members; inviting prospective members to chapter activities; hosting guests at a chapter meeting; developing and maintaining accurate lists of prospective members; encouraging existing members to renew their BDPA membership each year; and channeling successful, creative ideas on membership recruiting and retention to BDPA, so these may be shared among all chapters.

### **Special Task Forces**

These groups are appointed to deal with special projects/activities which do not recur on a regular basis. The chairman of each special task committee is appointed by the chapter president. These groups usually operate for a specific time frame specified; the time period may be extended, usually at the direction of the chapter president.

### **Chapter Executive Committee**

The chapter executive committee often serves as the “oversight” committee on finance, policy and planning. The chapter president serves as a chairman of the executive committee and all elected chapter officers are automatically members of the committee. Some chapters also include the chairmen of other standing committees as members on the executive committee.

The specific duties of the executive committee and the extent of its authority are usually defined in the chapter’s bylaws. In many chapters, the executive committee is charged with the responsibility of developing the annual operating plan. Once the plan is approved by the chapter, the executive committee is charged with the responsibility of ensuring that the goals included in the plan are achieved. Most chapters also allow the executive committee to operate as the governing body of the chapter between chapter meetings. The executive committee is usually authorized to expend chapter funds (up to a stated limit) without seeking approval from the chapter membership.

Additional committees that a number of chapters use, include:

- Planning and budget
- Publication and periodicals
- Professional development
- Legislative affairs/liaison
- Promotions, publicity and public relations
- College and university relations (includes student chapters.)

# BDPA Mission and General Objectives

Every program or activity undertaken must contribute fulfilling the mission and objectives of the organization. The degree of “performance contribution” of each program is measured yearly against these and specific program objectives. BDPA’s strategic/operational planning process, conducted under the guidance of the \_\_\_\_\_ a yearly, ongoing activity. The organizational mission, being a broad statement of the overall purpose of BDPA, does not change markedly from year to year. However, each year it is readdressed to help BDPA remain in tune with the times. The general objectives begin to “scope-out” the mission statement, giving insight to all areas of operation (programs and activities.) To keep BDPA fluid, proactive, and in constant search of ways to further improve the value of membership, the general objectives will likely change over each three-to five year time period.

## BDPA Goals

1. Maintain sound financial position
2. Provide valued services and relationships for all members.
3. Be the recognized leader
4. Expand membership
5. Gain recognition for “expert” database
6. Expand sphere of influence
7. Research and disseminate latest technology and requirements
8. Support personal, professional and social needs

## BDPA Mission Statement –

Include here

## Chapter Charter Agreement

The purpose of this document is to grant approval from the national BDPA organization to new and existing chapters to operate a local chapter in a specified, geographic region. In addition, chapters will benefit from the formal relationship by being legally associated with the national BDPA organization. The chapter agrees to adhere to all published BDPA policies and procedures and BDPA’s code of ethics. *Please contact NBDPA staff to request a copy.*

**Tradeshow Agreement** All chapters and regions that conduct tradeshow and seminars are required to submit a Tradeshow Agreement to the NBDPA including contract specifications with a producer. The purpose of this document is to grant approval from the national BDPA organization to new and existing chapters to use BDPA’s name and logo. *Please contact NBDPA staff to request a copy*

## Model Chapter Bylaws

Every BDPA chapter is required to submit a copy of the chapter’s bylaws. We have included a model in case your chapter’s bylaws need a total revision or just some fine-tuning.

## ARTICLE I-NAME AND LOCATION

The name of this organization shall be the \_\_\_\_\_ Chapter.  
This chapter is generally located in, which is defined as its major geographic service area.

## **ARTICLE II-OBJECTIVES**

The objectives of this chapter shall be the same as the organization purposes defined in the BDPA Bylaws. The major focus of this chapter's programs and activities shall be in fulfillment of the needs and expectations of members generally located in the chapter's service area.

## **ARTICLE III-USE OF FUNDS**

The chapter shall use its funds only to accomplish the purposes and objectives referenced above. No funds shall insure to the benefit of, or be distributed to, the members of this chapter of BDPA.

Note: This is a standard clause that protects the chapter. It should not be construed to preclude member expense reimbursement, where duly authorized by the Chapter.

## **ARTICLE IV-MEMBERSHIP**

All members of this Chapter must be members of BDPA. All requirements for membership shall be defined in the BDPA Bylaws.

## **ARTICLE V-DUES**

Chapter dues are as specified by the chapter's Board of Directors, with the approval of the Chapter's membership.

## **ARTICLE VI-MEETINGS**

### **Section 1: Chapter Meetings.**

Regular meetings of this Chapter shall be held at the time and place designated by the chapter President, or the chapter's Board of Directors, upon 15 day's notice.

### **Section 2: Quorum; Voting.**

A quorum shall consist of 40% of the (voting) Members. A majority of those Members present and voting shall govern.

### **Section 3: Conduct of Chapter Meetings.**

Chapter meetings shall be chaired by the chapter President. In the absence of the President, meetings are chaired by the Vice President, or other chapter officer selected by the President. The meeting shall be conducted according to Article XI of these Bylaws (Rules of Order.)

## ARTICLE VII-BOARD OF DIRECTORS

### Section 1: Authority.

The chapter's Board of Directors shall be the governing body of the chapter. The Board may delegate portions of its authority to the chapter Executive Committee.

### Section 2: Composition.

The Board shall consist of eight individuals: the five officers-a President, Vice-President, Secretary, Treasurer, and Immediate Past President; and three directors. The officers shall constitute the Executive Committee. All are elected by the (voting) Members of the Chapter. The President is the Chapter Delegate unless he is not a full Member. In this case, the President must designate an Alternate Delegate, who must be a full Member.

### Section 3: Nomination and Election.

(A) Nominating Committee: The Immediate Past President shall be the chairman of the Nominating Committee, which shall be composed of two additional members selected by the President. (B) Timing; Nominating Process: In the fall of each year, the Nominating Committee shall present a candidate from among the members of the chapter for each position on the Board about to be vacant. Elections may be conducted at a regularly scheduled chapter meeting or by 30-day mail ballot.

### Section 4: Term of Office.

The term of office is one year for all officer positions, and three years for the three Director positions (staggered so that one director is elected each year.) Any officer may serve a maximum of two consecutive terms in the same office. Directors may serve a single, three-year term as a Director. All terms of office, as well as the administrative and fiscal year, shall commence on January 1.

### Section 5: Board Meetings; Quorum.

The Board shall meet no less than four times each year at the time and place designated by the chapter president. In meetings of the Board, 50% of the Board members being present shall constitute a quorum. Meetings shall be conducted according to Article XI (Rules of Order.)

## ARTICLE VIII-DUTIES OF OFFICERS AND DIRECTORS

### A. President:

Presides at all meetings of the Chapter, Board, and Executive Committee; appoints all committees; is responsible to the chapter members for efficient and effective conduct of chapter affairs.



**B. Vice President:**

In the absence of the President, presides at all meetings. Additional duties are as assigned by the President.

**C. Vice President, Membership:**

reports to chapter president, chairs chapter membership committee and coordinates membership retention and new membership activities with regional membership chairman.

**D. Secretary:**

Responsible for official meeting minutes; chapter records, and related activities.

**E. Treasurer:**

Keeps an accurate record of all receipts and disbursements; submits summary financial statement to BDPA (for use with group tax exemption); makes payments with approval of the Executive Committee; submits reports at each chapter meeting or otherwise as directed by the President; prepares annual budget.

**F. Immediate Past President:**

Chairs the Nominating Committee, serves as advisor to the President.

**G. Directors:**

The duties of the three directors are as defined by the President, with the approval of the Board.

**ARTICLE IX-SPECIAL AND STANDING COMMITTEES**

**Section 1: Standing Committees**

There shall be, among others, the following standing committees:

- (A) Nominating
- (B) Membership
- (C) Planning and Budget
- (D) Programs
- (E) Professional Development
- (F) Promotion, Publicity and Public Relations
- (G) Publications and Periodicals
- (H) Legislative Liaison
- (I) College and University Relations

## **Section 2: Special Committees.**

The President, with the approval of the Board, may appoint such task forces, study groups, sub-committees and the like as warranted. **Section 3: Authority; Reporting.** The specific charge of each committee-both standing and special-shall be as specified by the President, with the approval of the Board. All committees shall report to the Board of Directors through the committee's chairman or otherwise as directed by the Board.

## **ARTICLE X-FINANCE**

In advance of the upcoming year, a budget shall be developed under the direction of the treasurer, and approved by the Board of Directors, covering the next fiscal year.

## **ARTICLE XI-RULES OF ORDER**

The rules contained in the current edition of Robert's Rules of Order shall govern the conduct of all meetings.

## **ARTICLE XII-DISSOLUTION**

In the event of dissolution of the chapter, all funds and other assets will be turned over to **BDPA.**

## **ARTICLE XIII-AMENDMENTS**

Amendments may be proposed by: (1) the chapter's Board of Directors on its own initiative; or (2) written petition signed by 25% of the (voting) Members of the chapter. Amendments will be approved upon two-thirds vote of those Members qualified and voting by 30-day mail ballot.

## **Evaluating Chapter Performances**

The ultimate performance measure of the chapter is provided by the members of that chapter through the annual membership renewal process. That's the bottom line. Improving the perceived member value of a chapter's programs and activities cannot be a one-shot affair. It's an ongoing process, tied to a chapter's annual operating plan. A major step in strengthening the chapter's performance-as seen through the eyes of the "ultimate authority"- is to begin assessing the chapter's current status. A helpful guide in doing this is the Chapter evaluation Checklist.

### **Purpose of the Chapter Evaluation Checklist**

The Chapter Evaluation Checklist is designed to provide BDPA chapters and others with the means of evaluating the overall performance of an BDPA chapter. The checklist can be used to pinpoint the specific strengths and weaknesses of a chapter, enabling one to more easily recognize areas of the chapters' operations which are in need of improvement.

The checklist, however, is **only** the first step. Chapter leaders should work together to develop an aggressive plan to correct deficiencies and to further strengthen the chapter's overall performance. The key to this is targeting chapter programs to identify member needs.

## **When to Perform the Evaluation**

The chapter should be evaluated a minimum of once each year. Semi-annual evaluations enable better determination of the progress the chapter is making. Suggested six-month evaluation points are at the mid-point and end of the year. This interfaces with the Chapter's annual operating plan.

## **How to Perform the Evaluation**

The evaluation checklist covers three major areas of chapter operations:

- (1) chapter membership;
- (2) chapter organization and management; and
- (3) chapter meetings and programs.

The checklist also provides space for comments from the chapter and recommendations from the evaluating officer. Since many of the questions require the evaluator to have knowledge of membership statistics, meeting dates, etc., it may be necessary for officers to work together to complete certain portions of the checklist. Before undertaking an evaluation, the evaluator should carefully explain the purpose of the evaluation to the chapter officers.

Chapter members should always understand that the evaluation is for their benefit and will help them to build a stronger chapter—one capable of providing increased benefits to the members.

## **Scoring the Evaluation**

Positive and negative point values are assigned to the response choices under each of the various checklist questions. Positive points are awarded to reflect favorable trends. Negative points are assigned to answers which indicate unfavorable performance. For example, a chapter which experienced a 15% increase in membership would receive a positive, 10-point rating for that area. A chapter whose membership decreased by 15% would receive a negative 10 points for that item.

After all the questions have been answered, the total number of points is calculated. In general, chapters with positive point totals are operating well, while chapters with negative totals are good candidates for special counseling and assistance. However, point totals are only an indication of the relative strength or weakness of a chapter. Even chapters with lower positive point totals might benefit from the help of the group director or vice president-region director.

## **Reporting the Evaluation**

One copy of the evaluation form should be mailed to the region director; one to NBDPA. The evaluator should retain a copy of the evaluation for the chapter's files. These forms become a record of the chapter's performance over a period of time.

(The following three pages contain the actual checklist form. It is intended as a helpful guide to assess and assist a chapter's progress.)

## **Strategic and Operational Planning Overview**

The following presents highlights of BDPA's strategic/operational planning process and related information. It provides general background on the nature and scope of the process, areas of consideration, types of activities, etc. typically undertaken in developing/updating NBDPA's strategic and operational plans. The strategic portion is more general than the operating segment, covers a longer time frame (five years), and has a yearly roll-over feature. This provides a more long-range focus, assisting the consistency of year-to-year directions. The operating segment of the planning process targets the detailed steps, program/activity organization, timing and specific resource allocation (per program or activity) necessary to carry out the next year of the strategic plan.

The operating plan (one year), then, is the tactical portion of the overall five-year plan. This process helps NBDPA to: (1) forecast future changes needed to combat competitive pressures; (2) determine the optimum mix of NBDPA membership services and benefits members will likely expect in light of changing environmental (and other) influences over this five-year time horizon; (3) organize resources (all types) in the most productive way-and with sufficient advance planning-to fulfill these future needs and expectations of members. While all the complexities and details involved with this total planning system may not be relevant to a specific chapter, the concepts are likely to be. This is particularly true for the short-run (annual) operating plan portion. From that perspective, then, it is recommended that the chapter carefully evaluate the implications of strategic assessments in developing its annual operating plan.

## The Scope of Planning

(Market-Centered (Member Needs) Approach) Proper planning involves a market-centered approach. This means that the focus of all planning centers is on the needs of the member (primarily) market-the constituency that makes up NBDPA. A market-centered approach is the opposite of a product-centered approach. In a product-centered approach to planning, typically one would have preconceived notions of the types of programs members want the delivery systems needed to meet those needs; i.e., a newsletter, type "X, Y and Z" meetings, etc. Unless these notions of what members want are based on solid research – which more often than not, they aren't –there is a sizeable chance the programs and activities will miss their mark. This adds up to poor attendance, less than enthusiastic acceptance, and, in fact, a weak complex of member benefits in total terms...as seen by the members.

(The ultimate "power" in any professional organization rests with the individual member. He or she casts an annual vote of confidence in the benefits being received through the membership renewal process.)

## What's involved in Meeting Those Needs?

Market-driven planning results in programs that meet identified member needs-as defined by the members. As with (national) BDPA, what an individual chapter wants to do must reflect what the members of that chapter want it to do. The ultimate purpose of any organization (both the national, in an overall sense-and each of its chapters) is to determine the problems/challenges of the constituency (the members), and then help them solve those problems.

To do this involves:

... Determining member/non-member (i.e., the consumer) needs, desires, and problems or challenges (as individuals or individual companies) that are being faced now, and those likely for the future.

... Defining what expectation these consumers have for the organization-in general; what it should be providing and what it should be doing.

... Identifying consumer expectations of the use, specific benefit, and overall value of the organization's mix of products, services, and activities.

... Assessing the current and future needs of the organization as an organizational entity. As with #1 above, this will involve the likely impact of political, governmental, legal, societal and other trends.

... Initiating products and services (programs that meet both consumer and organization needs and expectations).

... Targeting the development and execution of related programs in a cost-efficient, effective way. (Efficiency means doing things right; effectiveness means doing the right things. Both are important!)

... Evaluating, yearly, the degree each program or activity is contributing to member-need satisfaction.

## Vital Planning Elements

The following discussion lists considerations involved in conducting effective planning. Some of these are attitudinal; some deal with the process specifically. A Planning Model (summary flow chart) is included to capture the essence of the planning process. This is followed by SRI research on development cycles.

- 1 Need for change – to meet the challenges of the future, organizations will have to modify basic approaches, philosophies, and operational styles in order to continue being successful. Planned, results-oriented change to meet shifting environmental conditions and resulting changes in member needs/expectations will be needed.
- 2 Success – is a process; it is the progressive realization of worthy goals; it is measured by results achieved in light of the potential to achieve.
- 3 Needs analysis strategies are closely intertwined with the three primary roles for marketing in an organization:
  - Research-data collection; analysis
  - Positioning-the organization and related programs mix; pricing, promotion, and distribution strategies. Long-term improvement in marketing productivity-the ability to improve the results achieved in the research and positioning roles.
- 4 Strategic planning is much different than typical long-range planning (which is often trend-line extrapolation oriented.) In strategic planning, the plan integrates and drives the budget. In long-range planning, the budget drives the plan.
- 5 Strategic planning is objectives-oriented, emphasizing needs analysis and purposeful action. Strategic planning:
  1. Identifies opportunities for organization programs-products, services, and activities;
  2. Focuses on achieving results;
  3. Identifies the “what” and “how” to measure performance of the various programs and activities;
  4. Highlights tradeoffs critical to defining, analyzing and selecting alternative courses of action;
  5. Assesses the relative strengths and weaknesses of decision choices, enabling the selection of the optimum alternative;
  6. Equips the organization to deal with contingencies;
  7. Marshals all resources in the most efficient, effective way to maximize results.

- 6 This analysis is especially critical to step 1 – the strategic audit, and later in the program-service planning phase. (See planning flow chart.)
- 7 In the strategic audit phase we determine:
  - Member/non-member (prospect) profiles. This includes data on age, experience, education, responsibility level, length of membership, membership category, etc. It is often valuable to secure similar data on former members here, too.
- 8 From the above we find out what we know-or don't know-about current (and former) members. Is the member mix changing? If so, how and why? Is the organization attracting younger members-who are the lifeblood for the future? Why or why not? What type of members stay with the organization? Why? What type drops out? Why?
- 9 Measurement, by itself, is of no real value. Comparison of the data to yield conclusions is the key. (This is important in analyzing trends in survey results.)
- 10 Environmental Analysis. This helps define the target market gathers historical, present and future prospective that pinpoint the arena in which members and prospective members operate. It forecasts likely trends and provides an analysis of the competition. This phase involves understanding developments and trends in: the economy; technology; government/regulatory agencies; political, legal issues, and sociology
- 11 The strategic audit provides all those involved with the organization's planning effort a common "database", including:
  - Analysis of the external environment
  - Analysis of internal conditions
  - Identification of opportunities and threats
  - Identification of strengths and weaknesses.
  - Description of critical issues
  - Planning assumptions
- 12 In specific relation to the overall membership effort, the planning process identifies markets; market needs and expectations; market demographics, target markets for specific programs, and program mix. Particular emphasis is placed on competitive and other factors that influence membership promotion and retention strategies.
- 13 This process allows the leadership to:
  - Anticipate change
  - Plan effectively
  - Be flexible and viable, responding quickly when necessary
  - Adapt to new conditions
  - Above all, stay "in touch" with member needs/wants and provide the indispensable service/benefit.
- 14 Identifying member/prospect needs and expectations, analyzing the data, developing/refining products and services, etc., must be an on-going process.
- 15 We can stay in touch with members-and track their needs-and how we're doing-through:
  - Periodic mail and/or phone surveys.

- “On-site” surveys at conventions; expositions; conferences and seminars; general meetings. Regional/local discussion groups called for this purpose.
- Chapter/section/statewide general meetings (as applicable.)
- Leadership surveys and discussions
- Informal phone calls to members-the key: ask the right questions and listen.

16 Telephone surveys can be effective for hot issues, where give-and-take type feedback is required; fast response, limited scope items; confidential information, etc. The use of direct mail surveys provides a cost effective, easily administered way of gathering needed data. For valid, results-producing mail surveys:

- Every question must have an objective.
- Vary question type and format to maintain interest.
- Always pre-test survey.
- Stick to a 4-page (11 x 17 stock) maximum length, or response dwindles.
- The bulk (80% plus/or minus) of the time on the survey process should be spent in survey planning (including drafting, etc.)

### Positioning:

Proper positioning strategy helps identify specific programs and activities upon which the organization can target its efforts.

Positioning involves these seven steps:

Identify consumer-perceived needs as he/she sees things.

- 1 Group individuals (or single market elements) with similarly perceived needs; profile their demographics (and psychographics, as appropriate.)
- 2 If a product/service has multiple forms, cluster the various forms that satisfy the similar perceived needs.
- 3 Determine what other products/services are competitive to each perceived need. What do the consumers (or potential consumers) consider acceptable alternatives? How “competitive” is the competition?
- 4 Develop information on how the consumer perceives your product/service in terms of its advantages and disadvantages in comparison with the competition.
- 5 Structure a competitive matrix. This describes available products and services, prices, general marketing strategy and types of solutions offered for each consumer-perceived need. Then note the gaps.
- 6 Armed with this information, plus additional information of the resources available (and when, etc.) one can then realistically determine which of the positioning options will most likely yield the best return on total investment, **net ROI on assets (resources) employed.**

# Book 4

## Membership

Membership is the name of the game. The **organization**—and every local chapter—must depend on actively involved volunteer members if it is to achieve its goals and objectives. Most chapter members are aware of the importance of a strong membership. But members are often uncertain about their part in the chapter's recruiting and retention efforts. Many of the ideas and programs presented in the following pages have been taken directly from the successful experiences of **NBDPA** chapters. Also outlined are ideas for promoting the benefits of membership in **NBDPA** to prospective members.

These ideas are presented as suggestions, so the chapter should feel free to fit the methods and procedures to the specific needs and abilities of the chapter. The later portions of this section address the challenge of membership retention. Too often, chapters stress the recruitment of new members but don't take the necessary steps to retain current members. No progress is made if an existing member is lost for every new member who is recruited.

### Why Recruit?

Members are the lifeblood of any **organization**. Members provide the support that is needed to successfully carry out the programs and activities which have been planned for the chapter. It is the members who must identify needs, establish goals, **and** design and participate in programs and activities to achieve those goals.

A strong, growing membership also facilitates the exchange of ideas and information. One of the most important benefits of membership in **NBDPA** is the opportunity to meet and discuss problems with other **members** in your area. Each new chapter member brings a sizeable wealth of knowledge, experience and fresh ideas to share with other members of the chapter. Chapter members also provide the financial resources needed for the chapter to operate successfully. Because most chapters do not participate in fundraising activities, membership dues and fees are the primary source of income for the chapter.

It is also important to remember that the chapters serve as a training ground for future **NBDPA** leaders. Every member of the **organization** has an opportunity to participate on the local, regional and national levels. When the chapter recruits a new member, it is "recruiting" for both the chapter and **organization**. To become a member of a local chapter, one must belong to **NBDPA** national.

### Organize for Chapter Growth

The first key to a concentrated and organized membership recruiting and retention program is the appointment of a membership chairman. The main criteria to look for when selecting the chairman is a keen interest in building membership and an ability to organize. The chairman of the membership committee should have full knowledge of **NBDPA's** chapter programs and activities; to be able to relate the benefits of membership to prospective members in a meaningful way. Once the membership chairman has been elected or appointed, other members should be enlisted to serve as committee members.

When selecting members of the membership committee, it is especially important to choose only those individuals who have: (1) high interest; (2) enthusiasm; and (3) the ability to sell.



(Vendors/suppliers are prime candidates for the recruiting team. Not only do they have the skills and personality to sell, they see many prospects regularly.)

Other factors that should be considered are:

- Does the member have time available to make a positive contribution to the committee?
- Does the member have a working knowledge of the goals and objectives of the organization, the benefits and services available to members, and the basic requirements for membership in NBDPA? Will that knowledge come through effectively?
- Is the member capable of aggressively working with prospective members? Can that person show membership benefits as solutions to problems?

Once the membership committee has been formed, its first task is to review the membership needs of the chapter and establish identifiable, measurable goals for recruiting and retention. When establishing these goals, the committee should consider the number of potential members in the area, the sources for these new members; the number of members needed to achieve the chapter's overall goals and objectives; and what methods of membership recruiting and retention are available to the chapter. For example, let's assume that an NBDPA chapter currently has 40 members.

Once the goals and objectives for recruiting and retention have been established, the membership committee should present these goals in writing to every chapter member. By making each member aware of the established goal, the committee makes it easier for every member to actively participate in the recruiting and retention efforts.

The first step in designing recruiting or retention programs is to review last year's campaigns. What worked and why? What didn't work and how can it be improved? What else can we try? By combining proven methods with new innovations, the membership committee should be able to design a successful recruiting and retention campaign which will enable the chapter to meet its membership goal.

Many chapters consider membership drives to be low budget projects. Although it may not be necessary to expend huge sums of money on recruiting and retention, the membership committee should prepare an annual budget of income and expense, which should be part of the chapter's annual operating plan.

Materials such as chapter stationery, envelopes, stamps, brochures, etc., should each be considered. The committee should never be afraid to request the funds needed to implement a successful recruiting campaign. The membership committee's proposed budget should be submitted to the chapter's planning and budget committee (or executive committee) so that this can be included in the annual chapter operating plan/budget. The total budget is then approved by vote of the chapter.

A timetable for achieving membership objectives should be in the plan. Establishing deadlines helps to coordinate the efforts of the committee and makes it easier to measure interim goals against annual objectives. The timetable for achievement should be in writing and should be distributed to every chapter member. Once again, this type of printed information helps every chapter member identify his or her part in the recruiting and retention effort.

After the goals and objectives have been established, programs designed, budgets completed, and schedules for completion established, the final step is to assign specific duties and responsibilities to members of the committee and the chapter. Every member should be fully aware of what is expected as well as the dates on which specific projects and assignments are to be completed. It is only by coordinating every aspect of the recruiting and retention campaigns that the chapter can hope to be successful in meeting its membership goals.

## Identifying Sources of New Members

One of the primary sources of new members is your current chapter membership. Every chapter member should be able to provide the name of at least one co-worker or acquaintance who would qualify for membership in NBDPA. Members of the chapter who have customer lists which they should be willing to share with the chapter.

Other local sources of prospective members include:

- Guests invited to chapter meetings
- Non-member registrants at NBDPA seminars and conferences.
- Mailing list
- Membership lists from other organizations (who address portions of the market.)
- Listings from the local chamber of commerce.
- Regional trade magazine mailing lists.

NBDPA maintains a computerized list of member prospects throughout the United States. These lists are maintained in Zip Code order and are available to the individual chapters on request. When requesting a prospect list from NBDPA, please provide the postal Zip Code (from lowest to highest) for the area served by your chapter.

One goal of the chapter membership committee should be to develop a chapter prospective member file. Information on prospective members can also be retained in a simple spreadsheet. Each sheet would include the prospect's name, title, business address, phone number, etc. Records of previous contact with the prospective member, attendance at chapter meetings, etc., should be maintained on the file so that the membership committee will have an accurate profile of the prospective member's interest in NBDPA.

## Promoting Member Benefits

Once a list of prospective members has been compiled, the real work of attaining chapter membership goals begins. The first step is to make your prospective members aware of the benefits and services offered by the organization. Demonstrating how NBDPA serves today's members creates a positive image for the organization and your chapter. If the prospective member views NBDPA as an important opportunity to meet with others with similar responsibilities, he or she is more likely to seek membership.

Although the chapter's speakers, seminars and other professional activities are usually not a function of the membership committee, the programs and activities have an important impact on the membership committee's ability to achieve its goals. If membership in NBDPA is to be desirable, the chapter's programs must be designed to meet the needs of both members and prospective members. If the chapter's programs are out of tune with the needs of prospective members, chances are that prospects will have little interest in becoming actively involved the chapter. Many NBDPA chapters use direct mail campaigns, blast faxes, e-mail and e-newsletters to invite prospective members to participate in chapter activities.

The following are basic steps in a typical campaign.

### STEP 1:

Draft a promotion letter, email or blast fax piece to be sent to each prospective member. The more these are personalized, the better. The letter often acknowledges a previous indication of interest in NBDPA by the prospective member and includes an invitation to your next chapter meeting. Included with letters should be a membership brochure, a copy of the chapter's annual schedule of activities, and the name, address and phone number of the chapter member to be contacted for further

information. Follow this up by initiating the contact by phone. This same information can be conveyed in the emails and blast fax promotion pieces.

#### **STEP 2:**

After a prospective member indicates an interest in NBDPA, assign that person to a member of the membership committee. The committee member should extend a personal invitation to attend a future chapter meeting and should be ready to answer questions about the chapter's activities and the benefits of membership. Be sure to equip each committee member with the information needed to answer such questions completely.

#### **STEP 3:**

When the prospective member attends a chapter meeting, he/she should be welcomed at the door by the chapter president and the membership committee chairman. The president then introduces the guest to several other members of the chapter who, in turn, introduce other members of the chapter and make sure that the guest feels welcome. If possible, the membership committee member who extended the personal invitation to attend the chapter meeting should serve as the guest's host during the meeting.

#### **STEP 4:**

Immediately after the chapter meeting, members of the membership committee should again contact each prospective member. This should be by phone, personal letter, and personal visit...a combination of the three if possible. Prospective members who attended the chapter meetings should be thanked for their participation and should be invited to other chapter functions. This is also an excellent opportunity to invite the prospective member to join NBDPA. Prospective members who failed to attend the chapter meeting should also be contacted. The committee member should express the chapter's disappointment that the prospect was unable to participate and should invite him to a future meeting. The NBDPA member should also offer to provide any additional information the prospective member might want in order to become more familiar with the chapter and the organization. The importance of this type of follow-up cannot be overstressed. Most chapters have found that two or three contacts with a prospective member are needed before the prospect decides to join. Sometimes it takes even five or more contacts. Tenacity pays off!

#### **STEP 5:**

If a prospective member fails to respond to several invitations to attend a chapter meeting, the name should be dropped from the chapter's primary prospect list. These names should be transferred to a secondary prospect list so that the membership committee can contact them again later.

### **Make Every Prospect a Friend**

Letters, posters, brochures, etc., tell the NBDPA story. But personal contact is still the single most effective method of recruiting new members. Everyone has the need to belong. **The chapters that welcome prospective members and make them feel that they have an important place in BDPA.** A prospective member may be impressed with a letter from the chapter inviting participation in the next chapter meeting.

However, the letter itself will not make that person feel welcome. That is the job of the current member who makes a phone call to extend the personal invitation to participate. The fact that the member has taken time to make the call proves to the prospective member that NBDPA is interested in that person and is anxious to have him or her as a member. Walking into a room full of strangers can be one of life's most difficult moments

for many people. That is why the chapter president and membership committee chairman should greet each prospective member at the door and introduce other chapter members. This personal touch makes the prospect feel welcome and can often add the motivation needed to join the **organization**. Your job is not finished when the prospective member completes a membership application. You must now give your new member a proper welcome to NBDPA and the chapter. Each new chapter member should receive a welcome letter from the chapter president. This letter should be mailed to the new member immediately and should include an invitation to the next meeting. When the individual attends the first chapter meeting as a new member, he or she should be formally introduced to the other chapter members.

Remember, when a new member joins NBDPA, he or she may no longer be a target for your recruiting efforts, but immediately becomes a target for your member retention efforts. One way to lose new members is to “abandon” them after they sign the membership application. Make every effort to make these new members feel welcome in NBDPA. Get them involved quickly.

## **Member get a member**

As outlined earlier, the membership chairman and committee have indicated that they have the primary responsibility for membership recruitment and retention. The most successful campaign, however, will utilize every member of the chapter as an integral part of the “sales force.” Although the membership committee carries the ball, every chapter member must actively participate. For example, if every chapter member brought just one qualified prospective member to a chapter meeting, the chapter could double its size each year!

When the chapter views its recruiting roles in these terms, the seemingly impossible task of recruiting 15-20 new members during the year suddenly becomes a very attainable goal. The first function of your annual recruiting campaign should be a chapter meeting during which each chapter member receives the details of the campaign, the goals for the year, and the details of his anticipated participation. This “kick-off” session should be included as a part of the first meeting of each administrative year. The membership committee chairman can then provide progress reports periodically throughout the year. Some type of visual chart or graph, showing your chapter’s progress in achieving the recruiting goals you have set, can be an important plus in the membership campaign. Make sure the message conveyed by the visual presentation is also incorporated in your mailing, and that every member of the chapter receive these mailings so that they will have complete information on the progress being made.

## **Incentives to Win**

The tone, spirit, and conduct of your membership campaign should be designed to suit the “character” of your chapter. However, the membership committee should always attempt to conduct its campaign in a way that will generate spirit and enthusiasm. The atmosphere at your kick-off meeting, and the announcements at subsequent chapter meetings, should be charged with excitement and enthusiastically presented. Presentation and reports should be snappy, concise, to the point, and should be designed to reinforce the positive atmosphere. One sure way to ensure that the atmosphere remains spirited is to offer performance incentives. Divide the chapter into small groups and then let each group compete to determine which can recruit the largest number of new members. Each member of the winning group would then receive a small reward for successful performance.

Publicity for the purpose of recruiting new members should be included as an integral part of the chapter’s overall publicity and public relations campaign. Information concerning the benefits of membership, where to obtain information about NBDPA membership, and the name, address and phone number of a chapter contact should be included with all publicity announcements. In most metropolitan areas, there are trade publications

and neighborhood newspapers that will publish news releases and meeting announcements at no charge. Most radio stations and cable television systems broadcast service announcements at no cost to the **organization**. Publicity gained from area seminars, special chapter events, and other projects can be most effective in building awareness of **NBDPA** among non-members.

## Membership Applications Information

Official **NBDPA** membership applications are sent out in the first **VIP** package of the year upon request. Memberships are renewed by anniversary of date of application each year.

*Did this come from our bylaws really?*

*Taken from the **NBDPA** by-laws*

### 1. Classes of Membership. There shall be three classes of members.

(a) **Regular Member**. This class of membership is a full voting member of **NBDPA** and may hold all local, regional and national offices of the **Organization**. Within the Regular Member class, the Board of Directors may create subclasses of individuals, for unique recognition, such as: affiliate, retired, fellow, honorary, life, unemployed, who shall be recognized as such without affecting any voting rights.

(b) **Student Member**. An individual enrolled as a full-time student in an accredited institution of higher learning who intends to pursue a career that would involve-or interface. This class of membership may have voting rights within their respective chapters only.

(c) **Organizational Members**. Corporate/business membership for business entities with an involvement in  
Specific criteria for such membership may be set by the Board of Directors. This class of membership will have no voting rights.

**2. Chapter Membership.** All **NBDPA** Regular and Student members are encouraged to join a recognized **NBDPA** Chapter.

An individual that does not designate an **NBDPA** Chapter is a Member at Large (MAL).

### 3. Dues.

(a) The Board of Directors shall establish the membership term and a schedule of fees for participation in the **Organization's** activities. Payment of such fees or dues shall be a condition of membership. No dues, fees or assessments shall be refunded to any member whose membership terminates for any reason.

(b) A portion of annual dues, as determined by the Board of Directors, collected by **NBDPA** shall be remitted to the Chapter designated by an individual. No portion of a year's dues shall be rebated to another Chapter if an individual transfers.

## Membership Retentions

Each year, a percentage of **NBDPA** members choose not to pay their annual dues and renew their membership. Obviously, job changes and transfers are inevitable and can often make it impossible for a

member to continue to participate. However, the majority of members who fail to pay their annual dues do so because they are dissatisfied with NBDPA chapter programs and member benefits.

Past experience has proven that the majority of these members would continue their membership if they received the same type of personal attention devoted to prospective members. Many of the same techniques used to attract prospective members will help the membership committee to retain existing members. Anniversary membership renewal statements are mailed to all members of NBDPA three months prior to their expiration date.

During this three-month period, the membership committee should personally contact every member of the chapter and urge the renewal of membership for the coming year. NBDPA assists the chapter's retention efforts by providing monthly listings of members who have failed to pay their annual dues. Each unpaid member should receive a personal telephone call from a member of the chapter's membership committee. Some members simply "forgot to pay" while others have more serious reasons for their reluctance to renew their membership. The result of each follow-up phone call should be recorded so that the chapter will have a better picture of why members have chosen to drop out. The ability of the membership leader to identify and communicate benefits to the individual member is the key to success. Therefore, it is vitally important that you work closely with the other officers of the chapter and the committees. Before a volunteer can be successful in growing their chapter membership, a few myths need to be identified and clearly explained.

### **Myth 1 – Recruitment and Retention get equal resources.**

In reality, many chapters want to dedicate all their time and money to bringing new people into the chapter, and do not maintain effective steps to keep members. If the chapter hopes to maintain long-term growth, emphasizing retention is the wisest investment your chapter can make.

### **Myth 2 – There is always one more new member to recruit.**

As alluded to earlier, when you lose a member, you must recruit two in order to show growth. When you retain a member however, growth occurs with every new recruit.

### **Myth 3 – Members will renew no matter what.**

Chapters can no longer depend upon inertia of members to renew. In this day and age, members are always evaluating the value of something and will pick and choose where to invest their time and money. Membership in an organization is no exception; the chapter must deliver the goods!

### **Myth 4 – Just send a new member a letter.**

Simply sending a new member a welcome letter from the chapter is not enough. These individuals have a special need and by dedicating a few additional hours and resources to provide a personal touch to welcoming them, you can convert them to lifetime members.

### **Myth 5 – Retention begins the moment a member joins.**

Chapters must change this mindset to realize that retention is tied, in part, to how a member was recruited. Staying involved in an organization starts with the first contact, even before they send their dues money.

## **Recruitment and Retention Strategies Responsibilities by Month**

So, how do membership leaders implement a successful membership plan? The following pages detail a month-by-month guideline that membership committees and their chairman can follow throughout a one-year

term of office. These actions are standard operating procedures for any chapter membership plan, but they are not limited to their specific actions. Chapters are encouraged to develop their own initiatives within these guidelines.

## **JANUARY**

- Coordination with chapter executive board.
- Meet with committee and identify membership plan for the year to meet or exceed goals of the national BDPA Membership Committee
- Provide quarterly report to chapter executive board
- Meet with chapter vice president on quarterly basis to develop long-term strategies

### New Members

- Chapter president and membership chair receives new member list from BDPA national. Send out customized welcome letters or emails from president and note next chapter meeting
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## **FEBRUARY**

- Coordination with chapter executive board.
- Assist chapter vice president with completion of chapter evaluation

### Current Members

- Chapter president writes a one page summary of chapter activities, goals for the year, upcoming national events, and chapter activities and sends to all Current Members and prospects from January 1.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.

- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## **MARCH**

### New Members

- Chapter president and membership chair receives new member list from BDPA national. Send out customized welcome letters or emails from president and note next chapter meeting
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## **APRIL**

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## **MAY**

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members



- Chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## JUNE

### Current Members

- Membership committee members make 6-month follow-up call to January New Members to solicit input about chapter activities; and remind them of member benefits, upcoming activities, etc.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## JULY

### Current Members

- Membership committee members make 6-month follow-up call to February New Member to solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.
- Regional membership chairman provides chapter one-page summary letter of BDPA national efforts, activities and programs, focusing on results from June Planning meeting and board of directors meetings, and highlighting the Annual BDPA National Conference.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and send out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.

- Membership committee sends final follow-up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## AUGUST

### Current members

- Membership committee members make 6-month follow-up call to March New Members to solicit input about chapter activities and remind them of member benefits, upcoming activities, etc.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective members

- Chapter president and membership chair receive prospect list from BDPA national and sends out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## SEPTEMBER

### Current Members

- Membership committee members make 6-month follow-up call to April New Members – solicit input about chapter activities, remind them of member benefits, upcoming activities, etc.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and sends out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## OCTOBER

## Current Members

- Membership committee members make 6-month follow-up call to May New Members – solicit input about chapter activities; remind them of member benefits, upcoming activities, etc.

## New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

## Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and sends out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

# NOVEMBER

## Current Members

- Membership committee members make 6-month follow-up call to June New Members – solicit input about chapter activities, remind them of member benefits, upcoming activities, etc.
- Chapter president writes annual report of chapter activities for the year, highlighting new sponsors, future plans, and incoming slate of officers.
- Incoming chapter president sends letter to Current Membership noting goals for the year ideas for new programs and services, and encloses “chapter evaluation” for member to complete and return.

## New Members

- BDPA National provides chapter membership committee a list of first year members up for renewal of their second year of membership. Send special renewal letter encouraging them to continue membership.
- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

## Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and sends out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## DECEMBER

### Current Members

- Membership committee members make 6-month follow-up call to July New Members – solicit input about chapter activities; remind them of member benefits, upcoming activities, etc.

### New Members

- Chapter president and membership chair receives new member list from BDPA national and sends out customized welcome letter from president and note next chapter meeting.
- Membership chair assigns committee member to give “welcome phone call” to new member
- Membership chairman provides new member information to newsletter editor to add to chapter mailing list and publish welcome in next edition

### Prospective Members

- Chapter president and membership chair receive prospect list from BDPA national and sends out customized letter highlighting benefits of chapter membership
- Membership committee makes follow-up calls 1-2 weeks after above mailing.
- Membership committee sends final follow up letter two weeks after phone call. Letter should be customized based on feedback from phone calls.

## January (second year into action plan)

### Current Members

- Membership committee members make 6-month follow-up call to August New Members – solicit input about chapter activities; remind them of members benefits, upcoming activities, etc.

Repeat all other actions from previous pages. Modify actions and initiatives as membership changes and develops. Please refer to the following pages for samples of NBDPA Best Practices retention and recruitment letters and other communication tools.

## Establishing a New Chapter

One of the most worthwhile and rewarding chapter projects can be the establishment of a new NBDPA chapter. Although chapters are currently chartered in most major cities, there are still many areas where an NBDPA chapter would flourish. The basic requirements for forming a new chapter can be easily met. It can be a challenge to locate prospective members and plan the first organizational meeting- but NBDPA can help. Contact the VP of Member Management at the National Office.

NBDPA maintains lists of prospective members throughout the U.S.. There's other help available. *The Outline for Starting a New Chapter*; provides the basic procedures- (**Membership Appendix**)

## Why Start a New Chapter

Chapters are a prime part of the delivery system of membership benefits. Consequently, chapters are vital to the success of NBDPA. Chapter activities are informative, stimulating and fun. But a number of members (about 10% of the total) don't currently belong to a chapter. Why?

Usually, all the reasons boil down to just one: there isn't a chapter in the area. This means that members who aren't participating are missing out on a good bet. It also means that untold thousands of non-members who could be included in NBDPA and aren't now, are also missing out. (With over 150,000 member prospects in the U.S. alone, just think of the potential for NBDPA growth through chapter expansion...it's tremendous!)

Perhaps you were previously active in an NBDPA chapter. If you've recently moved, and there's no chapter in your area, you know how much you've lost. Maybe the chapter you're now a member of is not as accessible as you'd like. Or perhaps it's becoming impersonal. Or the meetings are a three-ring circus-or whatever. Starting a new chapter may be one of the best things you can do...for YOU...and the process can be made reasonably easy.

## Here's what to Do

Your first step is to contact NBDPA. The seasoned member services staff at NBDPA is ready to start working with you. ALSO, the VP-Region Director in your area is willing to help set up new chapters. As a professional, you probably know numerous other professionals like yourself who would be interested in the benefits of a chapter. If you are new to the area, the NBDPA staff can help by giving you a batch of name contacts from their huge list of thousands of prospective members, plus the member-at-large in your area. The list can be broken down by geographic or Zip Code area or just about in any way you would want. These lists are available at no charge, for chapter information purposes.

Once you think about it, 15-25 prospective chapter members should be easy just from personal contacts and NBDPA's available mailing lists. With a little work, the number could easily be two, three, five or ten times larger. There is no limit; the more you have to start with the better your chapter can be. (There's a "critical mass," numerical/prospect level you'll need to achieve in order to get things really moving.) Once you have lined up 15-25 professionals there are a few administrative procedures to complete and papers to be drafted. The sooner you start to form that new chapter, the quicker you'll start to benefit. Here are some other helpful hints to get you started.

## Five Basic Requirements

- 1 Objectives of the local group must be the same of those of NBDPA.
- 2 The individuals who ultimately constitute the local group must be eligible for membership in NBDPA, and must become NBDPA members to be a part of an NBDPA local chapter.
- 3 There should be 15-25 members in the new chapter.

(Official minimum is 12, which may not create enough "critical mass" to get a chapter really moving-20 to 25 is better.)

- 4 Chapter bylaws and other charter materials are approved by the NBDPA officers and directors.
- 5 All charter materials must be completed before chapter charter can be awarded.

## Ten Steps to a New Chapter

### 1. Identify Prospective Members in your area.

- Your local contacts-pyramid
- Suppliers' customer lists
- Other industrial, commercial and institutional lists
- BDPA members-at-large
- NBDPA prospect list
- Other sources

### 2. Contact Prospective Members and schedule an Organizational Meeting.

- Letter of introduction
- Membership brochure/application
- Follow-up mailings
- Personal phone calls and visits
- Issue notice of first meeting

### 3. Hold First Organizational Meeting

- Determine chapter mission
- Determine/discuss, member needs and expectations
- Review NBDPA objectives and activities
- Elect/appoint officers and/or steering committee
- Begin planning "chapter" activities
- Schedule additional meetings

### 4. Notify NBDPA of Intention of Organize Chapter.

### 5. Launch Recruiting Campaign.

- Expand initial base of "interested" parties
- Ask suppliers for a lot of help
- Build membership commitments
- Keep at it!

### 6. Draft Chapter Bylaws:

Model bylaws are available from NBDPA, and are included in the "Effective Chapter Operations" manual. (This makes a sometimes difficult task easy.)

### 7. Expand and Refine Chapter Operations/Activities.

- Appoint needed committees (get everyone involved.)
- Plan a full schedule of activities

### 8. Complete Membership forms; Collect dues and fees (from "charter" group.)

### 9. Schedule Charter Night.

### 10. Submit Required forms, fees and documents to NBDPA:

- Chapter bylaws
- Membership applications; fees/dues
- Roster of members; officers
- Letter of intent
- Calendar of activities

- Chapter name; scope
- Tentative charter date

Upon receipt of all items, the NBDPA officers and directors vote to award the charter. The charter date is confirmed and, on that day, the charter is conferred and officers installed (if possible, by an NBDPA National Officer.)

## **BDPA Chapters: Managing a Chapter**

The following documents are either part of the BDPA Chapter Management Guide or documents that support the process of creating a local BDPA Chapter.

### **Chapter Management Guide**

- [Table of Contents](#)
- [Book 1: Leadership](#)
- [Book 2: Duties of Chapter Officers](#)
- [Book 3: Leading & Managing Effective Committees](#)
- [Book 4: Membership](#)
- [Book 5: Meetings](#)
- [Book 6: Communicating with Members and Prospective Members](#)
- [Book 7: Finance and Accounting](#)
- [Book 8: Officer Transition Book: An Overview of Your Responsibilities](#)
- [Book 9: Tips on How to Reactivate Your BDPA Chapter](#)
- [Book 10: Forms & Samples](#) (*Please see list below*)
- [Book 11: Identity Program Guidelines](#)

### **Other Documents**

- [Tips on How to Reactivate Your BDPA Chapter](#)
- [Model Chapter Bylaws](#)

### **Forms & Samples**

- [Chapter Officer Form](#)
- [Chapter Budget Worksheet](#)
- [Financial Information and Direct Deposit Information & Form](#)
- [Application and Instructions for Chapter EIN Number](#)
- [Sample Phone Script: New & Prospective Members](#)
- [Organizational Chapter Survey Form](#)
- [Reactivating Chapter Program Survey Form](#)
- [Basic Chapter Budget Worksheet](#)
- [Template for Meeting Agenda](#)
- [Sample Meeting Minutes](#)
- [Sample Prospect Letter](#)
- [Why Belong to BDPA CHAPTER Letter?](#)
- [Sample News Release Form](#)
- [Sample Non-Renewal Member](#)
- [Sample New Member Follow up letter](#)
- [SITES Budget Template](#)



- [Wayne Hicks Documents \(More to come\)](#)

To learn more about local Chapters, please contact the National Vice President of Membership Management or any of the local Chapter Presidents.

# Book 5

## Meetings

## **BDPA Chapters: Managing a Chapter**

The following documents are either part of the BDPA Chapter Management Guide or documents that support the process of creating a local BDPA Chapter.

### **Chapter Management Guide**

- [Table of Contents](#)
- [Book 1: Leadership](#)
- [Book 2: Duties of Chapter Officers](#)
- [Book 3: Leading & Managing Effective Committees](#)
- [Book 4: Membership](#)
- [Book 5: Meetings](#)
- [Book 6: Communicating with Members and Prospective Members](#)
- [Book 7: Finance and Accounting](#)
- [Book 8: Officer Transition Book: An Overview of Your Responsibilities](#)
- [Book 9: Tips on How to Reactivate Your BDPA Chapter](#)
- [Book 10: Forms & Samples \*\(Please see list below\)\*](#)
- [Book 11: Identity Program Guidelines](#)

### **Other Documents**

- [Tips on How to Reactivate Your BDPA Chapter](#)
- [Model Chapter Bylaws](#)

### **Forms & Samples**

- [Chapter Officer Form](#)
- [Chapter Budget Worksheet](#)
- [Financial Information and Direct Deposit Information & Form](#)
- [Application and Instructions for Chapter EIN Number](#)
- [Sample Phone Script: New & Prospective Members](#)
- [Organizational Chapter Survey Form](#)
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- [Why Belong to BDPA CHAPTER Letter?](#)
- [Sample News Release Form](#)
- [Sample Non-Renewal Member](#)
- [Sample New Member Follow up letter](#)
- [SITES Budget Template](#)

- [Wayne Hicks Documents \(More to come\)](#)

To learn more about local Chapters, please contact the National Vice President of Membership Management or any of the local Chapter Presidents.

# Book 6

## Communicating with Members and Prospective Members

This section focuses on proper communication techniques and mailings (U.S. Postal Service, e-mail and faxes) necessary to promote the chapter within the community. For new chapters, and those who have been established for a short period of time, your communications should focus on internal needs. That includes implementing a plan to maintain timely announcements of meetings and chapter events. The chapter should also focus on creating timely newsletters that provide useful information about industry issues, announce upcoming chapter meetings, and highlight changes in membership. This section helps chapter leaders effectively promote the chapter activities in National BDPA publications.

For chapters that have been established for a number of years, it is assumed you already have internal chapter communications mailed on a regular basis. In order to expand the outreach of the chapter and generate new members, the chapter must implement an external communications plan. That includes mailings of press releases about chapter events to local newspapers and TV stations, as well as announcements of new officers appointed to chapter positions. Let us begin with basic communication vehicles - chapter meeting notices.

### INTERNAL COMMUNICATIONS Chapter Meeting Notices

A meeting notice should be mailed, e-mailed or faxed (blast faxing is fast and inexpensive) to all chapter members, group directors, regional vice presidents, and NBDPA every time a chapter meeting or event is planned. This meeting notice should include the following information: who the meeting is designed for, what is the topic to be discussed, where the meeting or facility tour is to be hosted, when participants should arrive, and how they should get there (directions to the meeting site). Any other pertinent information, such as fees, equipment needed, spouse information, and other related details, should be clearly stated. Chapters can also consider including a phone or fax number for members to call and confirm they will be attending. This is sometimes used for facility tours where attendance is limited.

*See Communications appendix for samples of electronic meeting notices.*

A meeting notice can be printed on a sheet of chapter stationary, so that the chapters contact information is clearly stated. When using e-mail, you can either make the meeting notice an attachment or just add it to the body of the text. The same format can be used in faxes. Chapter members who need more information, or want to inquire about special accommodations, should know who to call within the chapter.

A meeting notice should be sent no later than three (3) weeks before a scheduled meeting. Anything less than 3 weeks does not give an individual enough time to plan the event into their busy schedules, and the chapter runs the risk of not having a strong attendance.

It is highly recommended that chapters plan their meetings one-year out, and try to hold them on a consistent day of the month. For instance, many chapters will schedule a chapter monthly meeting on the second Wednesday of every month. By knowing this in advance, members become accustomed to keeping their schedules clear on that particular day, anticipation of a chapter meeting being held.

## Chapter Newsletters

A chapter newsletter is the most prevalent form of communications to its membership. It is probably the only method available to the chapter officers that has the capability of reaching every member of the chapter. Since most newsletters are sent to the chapter members, even those members who don't attend chapter meetings can be kept advised of chapter events. If done correctly, the newsletter can serve as a key member benefit and will ensure the retention of members for years to come. It can also serve as a recruitment piece to convince a new member to join the chapter. To save the cost of postage, many chapters are moving toward e- newsletters. See samples in the Communications appendix.

How often have you heard an inactive member explain the reason for inactivity as lack of information about chapter activities? Too many members slip out of the mainstream of chapter activities because the chapter hasn't told them what is going on or how they can benefit from becoming personally involved. A newsletter can be the communicator that solves this problem. The most effective newsletters are issued at least monthly. With this frequency, newsletters provide timely information. This keeps members advised of local activities as well as regional and national happenings in NBDPA.

In actuality, the more frequently newsletters can be issued the better. The average member will absorb information more readily if it is provided in relatively small doses. A strong, vital chapter has a lot of information to share with members, which can be handled most effectively by a regular series of newsletters or bulletins.

If the chapter is fortunate enough to obtain volunteers who like to write, then a newsletter editor should be identified as an official officer of the chapter. Their duty is to write, edit, create and mail a regular newsletter to members. This newsletter should contain information about what the chapter is doing on behalf of its members. It can contain the following information:

Filling the Pages. One of the first questions that the newsletter editor is likely to ask is "what do I do to fill all those pages every month?" To answer these probing questions, ask yourself what you would like to read if the newsletter were coming to you from someone else. The most successful newsletters combine the information members want to know with the facts they need to know. A few examples of items that might be included in a newsletter are:

1. Notes from the president
2. A brief column written by the chapter president can be used to highlight important chapter activities, provide a chapter status report, and highlight important regional or national happenings.
3. New Members-A brief profile of each new chapter member is an excellent way of introducing a new member to the chapter.
4. Officer Profiles -Some chapters run regular profiles of an officer in each issue so that chapter members get to know who they are and what they do.
5. The officers' views on matters of current interest can make for interesting reading.
6. Happenings on the Job -Members can share on-the-job experiences which might benefit others.
7. Education Information

8. In addition to announcing upcoming chapter programs, announcements of conferences and seminars of interest to the members can be included.
9. Regional and National News-Comments and announcements from the chapter's regional director should be included in each issue of the newsletter
10. Feature Articles-Some chapters include a feature article on a technical or management subject of interest to members. Most articles are written by chapter members or reprinted from other NBDPA publications.
11. Job Announcements-Newsletters, especially those issued at least monthly, can carry "Positions Available" and "Wanted" listings. This is a valued member service.
12. Information Exchange - This column gives the members an opportunity to request help with on-the-job problems. Other members with particular expertise in the problem area can contact the member and suggest solutions.

Print the newsletter on chapter stationary, or in a designed format that includes the official chapter name and appropriate NBDPA logo. At minimum, produce a newsletter quarterly. In addition, it can be sent to non-members with a cover letter from the chapter's membership chairman inviting them to become members of NBDPA.

Some chapters have turned their newsletters into revenue-generating projects by selling advertisements to local vendors. Your newsletter can contain space on a page to accommodate a business-card size advertisement for local shops as well as companies/organizations.

The cost of a business card size ad depends on a number of factors - how many read your newsletter, how often it is mailed, what size ad is provided, etc. It is best to contact other chapter officers in your area that offer paid advertising in their newsletters. They may be able to help you develop a pricing strategy of your own.

**Chapter and Region Web Sites: See the BDPA National site for web site links.**

## **1. Developing a chapter directory**

Importance a chapter directory is another important chapter publication. Most directories are published annually at the beginning of the new administrative year. Although the contents of the directory vary from chapter to chapter, the most common elements include a series of items designed to make the Chapter Directory a highly personal, usable item. Typically, chapter directories should include these five key sections:

**Roster of Members-** A complete roster of chapter members with their full names, titles, company addresses, and telephone numbers makes it easy for members to communicate among themselves throughout the year.

**Chapter Officers -** Most directories include a special listing of the chapter officers for the administrative year. A two- or three- sentence description of the duties of each officer will help members identify the proper person to contact when they have questions or problems.

**Regional and National Officers -** Names, addresses, and telephone numbers for the chapter's **group director**, **regional director**, and other national officers should be included in the directory. The address and telephone number for NBDPA should also be included.

Calendar of Events -A complete calendar of activities for the year should be included. In addition, dates of important regional and national activities can also be listed. Some chapters also choose to include community activities, conferences and seminars which would be of interest to members.

## **NBDPA Profile**

Because the directory will most likely be used with prospects as well as members, it should include a description of NBDPA, its mission and objectives, and the basic requirements for membership. This information is usually found in the beginning of the directory and serves as an introduction to the remainder of the publication.

Since most chapter directories are published only once each year, it is important for the chapter to provide members with periodic updates of information. A list of new members as well as changes in employment, address, etc., of existing members should be distributed so that members can update their copies of the directory and maintain an accurate contact list.

## **2. Advertising is a Must.**

The chapter directory provides another opportunity for the chapter to sell advertising space to suppliers. Like the newsletter, the directory can place a strain on the chapter's budget. Advertising will not only pay for the production and distribution of the directory, but can also provide extra funds to finance other chapter activities.

Members of the chapter who represent suppliers are usually willing to advertise their products or services in the chapter's directory. Non-member representatives of suppliers call on members regularly and may be willing to take out an ad in the chapter publication. This type of involvement may also lead these non-members to seek membership in the association.

Before beginning to solicit advertising, the chapter must determine how much ad space will be available in the directory and what the price of that space will be. In general, the pricing of ad space is determined by two factors: the size of the ad and the total distribution of the directory. For example, a one-half page ad in the directory distributed to 150 members would be more expensive than a similar ad in a directory distributed to 50 members. A simple way to determine the size of an ad is to divide a page in the directory into quarters. Potential advertisers would then have the option of purchasing an ad which would fill one quarter of the page, one half of the page, three quarters of the page, or a full page.

When fixing a price for the ad space, most publishers provide a "discount" for larger ads. For example, if a one-quarter page ad costs \$25, the price for a one-half page ad might be set at \$45. (Five dollars less than two quarter-page ads.) Too many ads can detract from a publication, but the chapter must exercise caution when attempting to limit the number of ads in a directory or other publication. Member and non-member suppliers should be given an equal opportunity to advertise. All potential advertisers must have "equal access." However, the advertising rates charged to non-members can be higher than the rates charged to members.

## **3. Distributing the Directory.**



The directory is another chapter publication which can perform a number of important functions. Naturally, every member of the chapter should receive a copy of the directory each year. Copies should also be sent to the group director, regional director and NBDPA.

Because the directory also contains a description of the mission and objectives of the association and a complete calendar of the chapter's activities, the chapter may wish to distribute it to prospective members. A well-designed and professionally printed directory which includes a complete schedule of the chapter's annual activities is an impressive publication. It proves to the prospective member that the chapter is a well-organized, aggressive organization. The directory can be an important membership recruiting tool.

The chapter should also send complimentary copies of the directory to other chapters in the region. Not only does this facilitate the exchange of information, but the calendar of activities of **another** chapter can be an excellent source of program ideas for your chapter.

This directory should be published and mailed during the first month that new chapter officers take over. As a source of revenue, advertisements can be sold in the publication to chapter sponsors, corporations, suppliers/vendors, and fellow members wishing to advertise their products and services.

*Getting Noticed in NBDPA publications* just like a local newspaper, the **NBDPA** communications staff is always looking for articles and information about chapter events and regional activities.

**NBDPA's** web site is also open to chapters to include promotions about upcoming meetings, opportunities to serve on a committee, and other local activities and initiatives. If your chapter has developed its own web site, you can link it to **the** NBDPA web page.

**To submit information to NBDPA, just follow these simple steps:**

Write a short synopsis of your chapter event or program, including information such as individuals to be recognized, purpose of the event, number of members participating, how the event was successful, and any other pertinent information. Always include a photo with the article. Be sure to identify each individual.

In your write-up, tell why you think this is a newsworthy event. You do not have to be lengthy - the important thing is to be clear and concise. Include the name, address and phone number of the contact person that **NBDPA** staff can call for additional information.

That's it! Do not hesitate to send in an idea. If it is interesting to you, it will probably make for an interesting story to someone else.

## **EXTERNAL COMMUNICATIONS**

**(Obtaining support from the local media)** When you think about it, your local newspapers, TV and radio stations have lots of space to fill each day with newsworthy items. They want interesting, entertaining news. Why not get some visibility for your local chapter and its efforts?

*This visibility can serve two purposes. One, it can provide publicity to potential non-members in your community that a viable, thriving organization exists in their area. And two, it sends a clear message to*

*local companies that employ NBDPA members that you are doing good things that reflect on our industry and their company.*

Chapters are encouraged to communicate with the local media by sending out news releases about newsworthy events, to announce local chapter awards and special events at chapter meetings. Do not be hesitant to approach local media. They want to know what is going on and welcome your assistance through news releases. While they may not always use the information offered to them, it still serves a purpose of building a relationship with your local media. It is always helpful to include interesting photographs with an article that can be readily published.

*First rule of thumb in generating publicity for your chapter - always try to hit the basic calendar of events in your local newspapers. This will help generate much publicity for very little effort. You never know where a potential member might come from!*

## **Getting the Most out of the Media**

Listed below are some suggestions for how you can get the most out of your local news media and build chapter public relations strategy:

1. Determine your purpose for getting noticed. Your goal should be a single statement, such as getting members to attend your trade show, or ask a reporter to cover your social event and publish in an upcoming issue, or to inform the community about something you have accomplished.
2. Determine the audience - who do you want to reach out to? **Fellow** employers of local companies, students, general community, etc..
3. Contact the local newspaper and introduce yourself. Tell them what you want to send, and ask them for their preferred method of submitting information. Some papers prefer it be mailed, others want it e-mailed, some want it sent to a specific person, etc.
4. Craft your message in a short news release. Be simple and concise. Use active, present tense words where possible. In addition, be sure to include your name, address and phone where the reporter can contact you for more information.
5. Follow-up the mailing of your news release with a phone call. This follow-up should occur about one week before the event.
6. Follow-up your phone calls within a day after the event. Do not be disappointed if you did not receive any coverage prior to the event. Provide the newspaper with a summary of what happened and forward any appropriate pictures showing local community members participating.
7. Always keep track of the contacts you made and the information you sent. This will be helpful for future mailings.

## **How to Write a News Press Release**

News releases should be typed, double spaces, on one side of 8 1/2 x 11 letterhead.

Do not use odd-size, colored, cluttered letterhead or other nonstandard paper.

Write clearly and concisely using straightforward English. Avoid slang, jargon, or clichés. The first paragraph should include the five W's of news writing- who, what, where, when, why, and sometimes how. Subsequent paragraphs should support the 5 W's with details, in priority order. Make your paragraphs short.

Leave one-inch margins on both sides and sufficient space at the top and bottom for the editor to make notes.

At the top right side of the first page, indicate name and phone number of your chapter contact person.

Drop down a few lines and on the left side of the first page write "For Immediate Release". Time your mailing or delivery of your release to coincide with the date you would like the article to be printed.

A headline is usually not necessary, but it does not hurt. It serves primarily to catch the interest of the editor and tell what the story is about.

## **Book 7**

### **Finance and Accounting**

#### **Budgeting**

No section of a manual which covers finance and accounting is complete without at least touching on the key aspects of budgeting. Budgeting, after all, is a major ingredient in tracking a chapter's financial status.

1. **Planning Comes Before Budgeting**

A budget is nothing more -or less- than the financial reflection of the plan...and the plan must come first.

Specifically, the chapter's operating plan must specify "what" the chapter is going to do, "who" is going to do it, "how" the activities will be handled, "when" -over what time frame- specific activities are going to occur, and with what financial results. These monthly financial "goals", covering both income and expense, are projections based on the plan. These projections are put together by the chapter's treasurer, a member of the planning and budget committee.

2. **The Financial Forecast is the Budget**

The various increments of income and expense necessary to carry out the plan are summarized on a monthly basis. Then the actual results achieved for that month are measured against the financial plan (budget). A monthly report (prepared by the chapter treasurer), which summarizes the "plan against actual," is presented at the related chapter meeting. This should be a written report, distributed to all in attendance, and summarized verbally during the "business section" of the chapter

meeting. The report form located at the end of this section of the manual, while intended as a year-end statement, can easily be used to prepare these monthly reports.

### 3. Fiscal Year

The Fiscal Year (noted as FY) covers a standard, 12-month period. The actual months covered by the fiscal period (so long as exactly 12 are included) are optional.

As noted previously in this manual, it is recommended that the chapter select the calendar year as its administrative year. This provides a system for more effective operational planning; it also takes advantage of the natural, psychological shift into the "new year."

To reduce the confusion that can result when administrative, fiscal, and the NBDPA membership year are all different (which needn't be the case), the same 12-month period should apply to all these periods, covered by the calendar year.

## Accounting

Tax Reporting/Related Current IRS rules specify that a chapter must file a tax return if the gross income (receipts) are in excess of \$25,000. Note: gross receipts include all money a chapter takes in, including meal receipts from members and guests for chapter meetings, etc.

If the chapter's funds are "invested" in an interest-bearing account, the IRS requires the financial institution to report that interest earned. Consequently, these institutions require the depositor to secure a federal identification number. Because NBDPA failed to include the securing of a Uniform Group Tax Exemption in its incorporation process years ago, chapters must currently secure their own federal I.D. number.

## Summary Chart of Accounts (Suggested)

### A. Receipts

- Chapter Dues (transmittals)
- Meal Receipts
- Assessments
- Publications and Periodicals (Newsletter/Meeting, Notice Advertisement, Directory Advertising, Other)
- Education and Training Programs Income
- Other Income

### B. Disbursements

- Administrative Expense
- Chapter Meeting Expense
- Membership Development
- Publications and Periodicals (Newsletter/Meeting Notice Expense, Directory-Expense, Other, Education and Training Programs Expense, Other Expense)

### C. Surplus (income less expense)

## Chart of Accounts (detail)

### A. Receipts

Chapter Dues (Transmittals)-This entry is solely to account for chapter dues at the time of deposit, normally from the annual check issued by NBDPA to the chapter for the dues it collected on the chapter's behalf. NOTE: Chapter dues rates are established by the chapter. NBDPA (national) serves as the collection agent for the chapter.

Meal Receipts -Most NBDPA chapters collect for meeting luncheons or dinners served. All actual cash received for meals is entered in this account.

Assessments- Occasionally, chapters levy special assessments rather than increase chapter dues (to offset meals over cost, for example).

Newsletter (or Meeting Notice) Advertising

A number of NBDPA chapters publish advertising in their monthly newsletter or meeting bulletin.

Income received for such advertising is accounted for here.

Other (Publications/Periodicals) On occasion, a chapter may publish a special report. This report may be sold by that chapter and/or selected to be a part of NBDPA's information resources (which may result in commissions paid to the chapter by NBDPA). Income derived is reported here.

Education and Training Programs Income

Chapters sponsoring conferences, seminars or other training programs are to report gross income. If income is derived from other sources, in addition to fees, list sub-items: (fees, exhibits, meals (if separate charge), other income).

Other Income Activity- The source of any income not otherwise identified (e.g., interest earned) and the amount of income received is under this account and included here. If more than one such item exists, list separately as a, b, c, etc.

### B. Disbursements

Administrative Expense - Expense incurred for each event) is accounted for as follows: promotion, equipment rentals, committee expense, speaker expense, meals, other meeting expense.

Awards and PR- All plaques and other awards presented by the chapter, press releases, etc., are accounted for in this account. Each activity (new student chapter, "Day With A Practicing Professional", "Career Days", purchase of individual career booklets, etc.) should be itemized.

Scholarships/Related-Scholarship grants should be itemized (a, b, c, etc.) within this account.

### C. Surplus

Amount of income over expense. (If under income, shown in brackets)

## **Reporting Financial Status**

The "Financial Data Form" is recommended for preparing the monthly chapter financial statements. Also, it should be completed each year and forwarded to **NBDPA**, covering the entire fiscal year.

by elected officers (e.g., postage, telephone, stationery, travel and other authorized expense) is included here. Accounts may include (among others): stationery, supplies, printing/postage, telephone, committee meetings, travel, other expense (misc.-not included as part of a specific item)

Chapter Meeting Expense-Expense directly related to the promotion, conduct and food service of regular chapter meetings.

Sub-accounts often include: meal expense, speaker expense, equipment rental, other meeting expense (room rental, tickets, etc.)

### **Member Recruitment and Retention**

Expense of recruiting new members, including (complimentary) prospect meals, etc. retention of members, including mailings, etc.

Newsletter, Meeting Notice-All expense incurred in publication of the monthly newsletter or meeting notice is accounted for as follows: printing, mailing and postage, other

Directory-All expense incurred in the preparation and issuance of the directory is accounted for as follows: printing, mailing and postage, other).

Other Periodicals/Publication Expense (as applicable).

Education and Training Programs - expense incurred in sponsoring each seminar, conference, training program, etc., (separately)

## **Surplus**

Amount of income over expense (If under income, shown in brackets)

## **Reporting Financial Status**

The "Financial Data Form" is recommended for preparing the monthly chapter financial statements. Also, it should be completed each year and forwarded to **NBDPA**, covering the entire fiscal year.

# **Book 8**

# Officer Transition Book: An Overview of Your Responsibilities

## Dear New Chapter Officer:

Each year, most chapters elect new officers to fill leadership positions. Although there are manuals available through Headquarters that can assist in their new roles, many new officers find themselves searching for clear and concise guidelines to help them achieve their objectives for the year. With this in mind, we have developed this short booklet to provide you with useful tips on how to better fulfill your new leadership role. This booklet includes guidelines on specific duties and responsibilities for each leadership position. We hope you will find suggestions listed in this booklet useful. Keep us informed on any successes your chapter experiences, or any ways to improve this document. Best of luck in your new position! The NBDPA Membership Team

***Note:** Throughout this material you will find job descriptions and suggested tips for each chapter leader. Although this booklet provides a general guideline for each leadership role, check to see if your chapter bylaws also include additional information.*

A detailed outline of each officer's duties, including a month-by-month checklist, can be found in Book 2 "Duties of Officer Chapters" at [www.BDPA.org](http://www.BDPA.org) or you may call NBDPA at National Office.

## Responsibilities of the Chapter President

1. Serves as the chief elected officer of the chapter.
2. Presides at all chapter meetings and meetings of the Executive Committee.
3. Serves as the ex-officio member of all chapter committees.
4. Conducts all meetings in accordance with NBDPA bylaws, Chapter bylaws and Robert's Rules of Order.
5. Ensures that all officers and committee chairpersons perform their duties.
6. Have other duties as described in the chapter's bylaws or operating procedures.

## Suggested tips for the Chapter President Include:

- Work with the Vice President and the program chairman to develop a calendar of events for the year.
- Act as main spokesperson for the chapter. The president should agree to represent NBDPA at other meetings.
- Make sure that all leaders in the chapter have clearly defined job descriptions.
- Ensure that all necessary paperwork is sent to NBDPA. For example, make sure the treasurer sends in the financial data form and the secretary turns in the officer report form at the beginning of each year.
- Work with the Student Chapter advisor and the local NBDPA chapter liaison if one is assigned.
- Serve as the contact person who submits articles or information to the VP of Member Management at NBDPA.
- Work with the other chapter officers and committee chairpersons.
- Recognize the hard work of chapter members by honoring them with a certificate or other form of recognition at a chapter meeting.

## Responsibilities of the Chapter Vice President

1. Assume the duties of the president in his/her absence.
2. Serves as the chairperson of the Chapter Program Committee.
3. Have other duties as described in the chapter bylaws or operating procedures.

## Suggested tips for the Chapter Vice President include:

- Work with the treasurer to prepare an operating budget for the year.
- Attend any local training programs.
- Attend all chapter board meetings.
- Assist the treasurer in conducting chapter planning and budget committee meetings.
- Work with Chapter Membership Chairman to coordinate surveys on chapter membership recruitment and retention.

## **Responsibilities of the Chapter Membership Chairman**

1. Report directly to the Membership Chapter President.
2. Coordinates membership retention and new chapter membership activities.
3. Chairs chapter membership Committee.
  - a. Develop annual goals/objectives for membership retention and new member recruiting.
  - b. Develop and oversees implementation of plans in support of membership goals/objectives.
  - c. Coordinate usage of prospective membership lists.
  - d. Coordinate hosting of prospective members.
  - e. Coordinate introduction of new members.
  - f. Coordinate and encourages existing member renewals.
4. Channels successful ideas/programs relating to recruiting and retention to the chapter president.
5. Coordinates and cooperate with other student chapter Membership Chairs to support membership recruiting and retention efforts.

## **Suggested tips for the Chapter Membership Chairman include:**

- Establish a public relations committee to promote NBDPA membership.
- Participate in local trade shows and/or conferences to recruit new members.
- Assist in providing speakers for chapter meetings. When publicized, this is a great way to invite new prospects to chapter meetings.
- Work with other chapter officers in establishing a publications and periodicals committee to develop a chapter newsletter or a chapter membership directory.
- Publications and periodicals can be sent via e-mail and/or placed on the chapter web site if they have one.
- Provide surveys for prospects, new members and members who have left the chapter.

## **Responsibilities of the Chapter Secretary**

1. Record the minutes of all chapter meetings and other meetings as requested by the chapter president.
2. Maintain an accurate, up-to-date roster of chapter members, member demographics, etc.
3. Provide chapter members with notices of all regular or special chapter meetings.
4. Read (during the chapter meetings) all official correspondence received by the chapter; summarize reports the chapter received, etc.
5. Notify NBDPA of changes in member contact information.
6. Submit a complete list of chapter officers to NBDPA VP of Member Management immediately after each chapter election.
7. Other duties and responsibilities as described in the chapter bylaws or operating procedures.



### **Suggested tips for the Chapter Secretary include:**

- Maintain an accurate list of new prospects at each chapter meeting. These names can be compiled into a large prospect base for the chapter.
- Maintain an accurate chapter officer list and report any changes to VP of Member Management.

### **Responsibilities of the Chapter Treasurer**

1. Receive all income and make all expenditures on behalf of the chapter.
2. Maintain accurate, complete financial records for the chapter.
3. File all financial forms and reports as needed by the local, state and federal government or NBDPA.
4. Make regular reports of the chapter's financial status to chapter membership.
5. Have other duties as described in the chapter bylaws or operating procedures.

### **Suggested tips for the Chapter Treasurer include:**

- Establish a planning and budget committee to assist with the financial administration of the chapter.
- Submit to Headquarters a yearly financial data form.
- Make sure the chapter has its own EIN (Employer Identification Number.) For chapters without an EIN number, **a form and contact information is available on the NBDPA web site.** Contact the VP of Member Management or go online to irs.gov for an online application.
- Create a chapter financial handbook. Pertinent information to include would be a listing of the financial management responsibilities of the treasurer, steps involved in preparing a budget and cash management practices to follow with checking accounts, reserves and investments.

### ***Don't forget:***

*As a chapter officer you have the opportunity to develop relationships with everyone in the chapter. Committees are an important way to accomplish great things and give everyone in the chapter a chance to contribute and participate. There are numerous committees that a chapter leader can develop. Outside of the nominating committee, membership committee and program committee, additional committees could be developed as needed by the chapter.*

## **Book 9**

### **Tips on How to Reactivate Your BDPA Chapter**

Dear BDPA Member: I am pleased to hear you are interested in reactivating a local BDPA Chapter in your area. Please read all the enclosed information carefully so that you are comfortable with the level of commitment it will take to reactivate this chapter.

### **What Makes a Chapter Successful?**

An effective chapter will have the following characteristics:

- Publicly accessible meeting place for members
- Setting goals and regularly measuring their progress
- Established systems for administrative and financial functions
- An active membership recruitment and retention program
- Ongoing programs that serve identified interests of the chapter members
- A broad-based fundraising plan
- Enough capable leaders to carry out the daily work of the chapter

Remember, no matter what stage of chapter development you may be in, chapters are part of a larger association. NBDPA chapters work hand-in-hand with the national organization to ensure that their individual and joint efforts support the work of the association as a whole.

## **NBDPA's Mission Statement**

Provides education, certification, technical information and other relevant resources for IT Professional, operations and maintenance professionals worldwide.

## **Where do I find members and sponsors?**

Everyone who comes in contact with the chapter is a prospective member or sponsor. Callers, walk-ins, program attendees, trade show participants, meeting sponsors – all of these people (and others who contact NBDPA directly) are potential members, contributors and volunteers. These names should be included in your prospect list and should also be forwarded to NBDPA. An easy way to develop a prospect list is to enter the names, addresses, phone, and fax and email addresses into an Excel file. Don't let them get away!

## **What do I do first?**

Here is a summary of the steps to complete as you begin exploring the possibility of reactivating this chapter.

1. Make contact with individuals on member lists provided by NBDPA to inform them about the possibility of reactivating this chapter
2. Hold an exploratory meeting to determine interest and resources available
3. Recruit 10-15 people who will help redevelop the chapter
4. Identify the area to be served by this chapter
5. Set up meetings chapter members may initially suggest their place of business
6. Review and/or re-write outdated chapter bylaws
7. If the chapter does not already have an Employee Identification Number (EIN) you can use the instructions and application enclosed to apply for one.
8. Establish a chapter leadership structure, elect or appoint officers, notify NBDPA
9. Establish the chapter budget and set up a chapter checking account (must have an EIN number to do this.) Contact NBDPA for additional chapter financial information.

Reactivating an NBDPA chapter is an ongoing process that will not be accomplished overnight and does require a commitment of energy and dedication. By calling and inquiring how to bring the benefits of NBDPA to your local area, you have completed the initial step. The NBDPA staff and region volunteers will guide you every step of the way. The Headquarters staff works with existing and emerging chapters to provide technical assistance in all areas of chapter management and development. In addition, we are available to assist with

chapter functions, including public relations, finance and administration, and program services. We are looking forward to working with you as you begin to lay a new foundation for this chapter.