

# CHAPTER CHARTER CHECKLIST



## NEW PROFESSIONALS CHAPTER CHARTERING CHECKLIST

Chapter Information	
Proposed Chapter Name:	
Region:	
Organizer's Name:	

Chapter Start-Up Checklist	
<input type="checkbox"/>	<p>Research the process for organizing a NSBE Chapter</p> <ul style="list-style-type: none"> <li>• Review NSBE's requirements for active chapters</li> <li>• Validate necessity (e.g., determine whether a chapter is already exists in close proximity and may meet the needs of potential members.)</li> <li>• Identify requirements for Federal Tax-Exempt organizations and state/local non-profits.</li> <li>• Contact NSBE for guidance and suggestions</li> </ul> <p>(Professionals Membership Chair – <a href="mailto:pebmembership@nsbe.org">pebmembership@nsbe.org</a>)                      (WHQ Membership – <a href="mailto:membership@nsbe.org">membership@nsbe.org</a>)                      (Region X Professionals Chair – <a href="mailto:rXpebchair@nsbe.org">rXpebchair@nsbe.org</a>)                      X = 1-6</p>
<input type="checkbox"/>	<p>Identify and scout potential locations for chapter meetings and/or events</p>
<input type="checkbox"/>	<p>Begin recruiting potential members of the chapter</p> <ul style="list-style-type: none"> <li>• Acquire a list of current members not affiliated with a chapter that live in the area where the chapter will be started</li> <li>• Leverage lists of Local University Alumni Association members.</li> <li>• Reach out to companies and social circles for individuals interested in being a part of the chapter</li> </ul>

<input type="checkbox"/>	<p>Organize and hold first meeting to begin formalizing the chapter organization</p> <ul style="list-style-type: none"> <li>• Invite NSBE Leadership to serve as organization ambassadors/supporters.</li> <li>• Allow attendees to engage and get to know each other</li> <li>• Explain purpose of NSBE, goals, potential programs and activities</li> <li>• Collect potential member contact information; identify ways that attendees can remain in contact and communicate (e.g., Slack or GroupMe)</li> <li>• Determine future meeting timing and frequency</li> </ul>	
<input type="checkbox"/>	<p>Make contact with your Region’s Chair-Elect (rXpebchairelect@nsbe.org) to express interest in chartering the chapter and confirm rules to be followed:</p> <ul style="list-style-type: none"> <li>• Confirm requirements</li> <li>• Familiarize group with NSBE governing documents (National Constitution, National Bylaws, National Professionals Bylaws, Regional Professionals Operating Guidelines) and how they apply to the chapter</li> <li>• Gain understanding of NSBE Connect database and information available</li> </ul>	
<input type="checkbox"/>	<p>Agree upon chapter leadership</p> <ul style="list-style-type: none"> <li>• Define what positions are needed</li> <li>• Identify/agree to who will fill those positions</li> <li>• Hold an election to fill the positions, if appropriate.</li> </ul>	
<input type="checkbox"/>	<p>Identify requisite number of members of the new chapter (<math>\geq 10</math>), and confirm that they have paid for National Professionals membership.</p>	
<input type="checkbox"/>	<p>Create and approve chapter constitution</p> <ul style="list-style-type: none"> <li>• Template available (<a href="#">link</a>)</li> </ul>	
<input type="checkbox"/>	<p>Formally petition for a chapter charter or chapter reinstatement with NSBE. Click and complete form (<a href="#">link</a>).  Note: Chapters seeking to reinstate an existing inactive chapter should forego completing the form and e-mail <a href="mailto:pebmembership@nsbe.org">pebmembership@nsbe.org</a> and their respective Regional Chair-Elect with a request for reinstatement.</p>	

<input type="checkbox"/>	<p>Set up the finances of the chapter</p> <ul style="list-style-type: none"> <li>• Apply for IRS Employer Identification Number (EIN), if applicable.</li> <li>• Register with state as a non-profit, if applicable.</li> <li>• Register for federal tax-exempt status (either as NSBE subordinate (i.e., GEN) or as an independent exempt org.) Check IRS website for more information.</li> <li>• Create a budget and establish a method of accounting (cash or accrual)</li> <li>• Open a business banking account.</li> <li>• Define how chapter will gain revenue (member dues, fundraising, event sales, donations, corporate solicitation)</li> </ul>	
<input type="checkbox"/>	<p>Create chapter marketing and communications tools</p> <ul style="list-style-type: none"> <li>• Chapter Website/Web Domain</li> <li>• Chapter Social Media Accounts</li> <li>• E-mail list-serve/E-newsletter</li> <li>• Membership recruiting media (flyers/brochures)</li> <li>• Event promotion media, templates (flyers)</li> <li>• Ensure compliance with NSBE Logo Guidelines</li> </ul>	
<input type="checkbox"/>	<p>Create Chapter Strategic Plan and Begin Routine Chapter Operations.</p> <ul style="list-style-type: none"> <li>• Leverage Regional Leadership on Best Practices</li> <li>• Engage other active chapters on programming that works.</li> <li>• Plan to attend National and/or Regional NSBE events to network and collaborate with members from other chapters.</li> </ul>	

## Chapter Operating Guide Checklist

### 1. EXECUTIVE BOARD AND OPERATIONS

- Update all board member descriptions
- All executive board positions and delegates are filled
- Plan for board member transition developed and documented
- Executive Board members entered into NSBE Connect for the year
- Listing of Executive Board members and contact info updated on chapter website
- Board meetings scheduled; schedule agreed to by board
- Board member directory created; communication medium between board members established.
- Board meeting minutes and reports documented and archived in location accessible to board
- Board members in contact with regional board counterpart(s)
- Board members attend routine meetings scheduled by regional board counterpart
- Chapter reporting of activities to regional/national organization completed as required.

### 2. CHAPTER DATA MANAGEMENT

- Chapter member database up to date and maintained.
- Chapter e-mail list serve up to date and maintained.
- Lists of donors, sponsors, and volunteers maintained with contact information.
- Promotional materials maintained and stored for use as needed.

### 3. FINANCIAL PLANNING

- Annual Budget developed and approved
- Financial statements prepared for each board meeting and reviewed by board members.
- Board members have plans for how their part of the budget will be achieved, both in terms of revenue and expenses.
- All receipts and invoices are submitted, recorded and archived.
- Chapter financial records collected in a single place for year-end reporting and auditing.

#### **4. MEMBER AND COMMUNICATION MANAGEMENT**

- Member renewal reminder letters/e-mails are scheduled and sent.
- New Member welcome e-mail developed and sent to all new members.
- New Member Orientation guide/packet is up to date and sent out with welcome e-mail.
- Member only section of website up to date with latest resources for members.
- Plan developed to re-engage members who have not opened a chapter e-mail or attended an event within the last six months.
- Annual member survey questions developed; date for issuance set.
- Routine communication plan developed (Content, medium, timing, resources needed)

#### **5. FUNDRAISING**

- Report generated on results of fundraising efforts for prior period.
- Fundraising strategy for future needs developed.
- Fundraising calendar developed. (Goals, events, dates)
- Corporate solicitation package created and distributed to potential sponsors.
- Fundraising contingency plan developed (what will be done if fundraising goals aren't met.)
- Acknowledgements/thank you letters set up and sent promptly to donors, sponsors and volunteers.

#### **6. VOLUNTEER PLANNING**

- Volunteers trained on programming.
- Back-up volunteer reserve created
- Volunteer appreciation materials (i.e., swag) created and distributed.

#### **7. WEBSITE**

- Ensure key information is easy to find
- Sections intended for current information up to date.
- "About us" section updated, current, and accurate
- Chapter e-newsletter archive available.
- Images/Photos from most recent event or activity posted.
- Contact Information up to date and accurate
- Make sure all links and forms work
- Copyright in footer is current year

## **8. EVENT PLANNING**

- Event calendar for the year published on website
- Fundraisers scheduled.
- All events have a lead assigned.
- Events include planned networking sessions for members.
- Event speakers scheduled and confirmed
- Confirm event types are varied and mission directed. (e.g., Professional development seminars, networking, social events, fundraisers, volunteer events, etc.)
- Event promotional materials developed
- Promotional /PR strategy developed and executed.
- Social media posts scheduled and issued to specific channels
- Event registration system developed and used to track RSVP; lists of registrants and attendees exported to appropriate contact database (member, volunteer, supporter).

#### **9. EXECUTIVE BOARD AND OPERATIONS**

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