# Chapter Charter Checklist

## New Professionals Chapter Chartering Checklist

### Chapter Information

<table>
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<tr>
<th>Proposed Chapter Name:</th>
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<tr>
<td>Region:</td>
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<tr>
<td>Organizer’s Name:</td>
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### Chapter Start-Up Checklist

- [ ] Research the process for organizing a NSBE Chapter
  - Review NSBE’s requirements for active chapters
  - Validate necessity (e.g., determine whether a chapter is already exists in close proximity and may meet the needs of potential members.)
  - Identify requirements for Federal Tax-Exempt organizations and state/local non-profits.
  - Contact NSBE for guidance and suggestions
    (Professionals Membership Chair – pebmembership@nsbe.org)
    (WHQ Membership – membership@nsbe.org)
    (Region X Professionals Chair – rXpebchair@nsbe.org)
    X = 1-6

- [ ] Identify and scout potential locations for chapter meetings and/or events

- [ ] Begin recruiting potential members of the chapter
  - Acquire a list of current members not affiliated with a chapter that live in the area where the chapter will be started
  - Leverage lists of Local University Alumni Association members.
  - Reach out to companies and social circles for individuals interested in being a part of the chapter
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<th>Organize and hold first meeting to begin formalizing the chapter organization</th>
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|   |   - Invite NSBE Leadership to serve as organization ambassadors/supporters.  
|   |   - Allow attendees to engage and get to know each other  
|   |   - Explain purpose of NSBE, goals, potential programs and activities  
|   |   - Collect potential member contact information; identify ways that attendees can remain in contact and communicate (e.g., Slack or GroupMe)  
|   |   - Determine future meeting timing and frequency |
|   | Make contact with your Region’s Chair-Elect (rXpebchairelect@nsbe.org) to express interest in chartering the chapter and confirm rules to be followed: |
|   |   - Confirm requirements  
|   |   - Familiarize group with NSBE governing documents (National Constitution, National Bylaws, National Professionals Bylaws, Regional Professionals Operating Guidelines) and how they apply to the chapter  
|   |   - Gain understanding of NSBE Connect database and information available |
|   | Agree upon chapter leadership |
|   |   - Define what positions are needed  
|   |   - Identify/agree to who will fill those positions  
|   |   - Hold an election to fill the positions, if appropriate. |
|   | Identify requisite number of members of the new chapter (≥ 10), and confirm that they have paid for National Professionals membership. |
|   | Create and approve chapter constitution  
<p>|   |   - Template available (link) |
|   | Formally petition for a chapter charter or chapter reinstatement with NSBE. Click and complete form (link). 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>
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<th>Section</th>
<th>Tasks</th>
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| Set up the finances of the chapter | - Apply for IRS Employer Identification Number (EIN), if applicable.  
- Register with state as a non-profit, if applicable.  
- 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.  
- Create a budget and establish a method of accounting (cash or accrual)  
- Open a business banking account.  
- Define how chapter will gain revenue (member dues, fundraising, event sales, donations, corporate solicitation) |
| Create chapter marketing and communications tools | - Chapter Website/Web Domain  
- Chapter Social Media Accounts  
- E-mail list-serve/E-newsletter  
- Membership recruiting media (flyers/brochures)  
- Event promotion media, templates (flyers)  
- Ensure compliance with NSBE Logo Guidelines |
| Create Chapter Strategic Plan and Begin Routine Chapter Operations. | - Leverage Regional Leadership on Best Practices  
- Engage other active chapters on programming that works.  
- Plan to attend National and/or Regional NSBE events to network and collaborate with members from other chapters. |
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**
   - 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
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    - 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.

11. **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.
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14. **VOLUNTEER PLANNING**
☐ Volunteers trained on programming.
☐ Back-up volunteer reserve created
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15. **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.
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☐ 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.)
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