Operations Checklist

Goal setting for chapters:
- Build strong board
- Membership
  - Over-weighted membership – too many attorneys, CPAs, insurance, etc.
  - Restricting membership in certain categories
- Revenue
  - Avoid stagnation
  - Sponsorship
    - Levels of sponsorship helps raise money
    - Sponsorship for programs are key to offsetting costs
    - Question re: requirements for sponsors – levels and costs
    - Guidelines for who can speak (i.e. relationship between sponsors and members)
  - New events to increase younger generation interest/involvement
- Education
  - Paying speakers / top level speakers
  - CE credits – member needs / survey to see if there is substance to the topics delivered
- Administrative roles for chapter
  - Organizational meetings at the beginning of the associations calendar year
  - Who writes up / keeps the books and records
    - Get a member with the skill
    - Get a management firm
  - As Board Member / President of the Association...
    - What’s your focus?
    - What tasks do you face as a new board member or President?
      - Updating bylaws
    - Quorum requirements
      - Percentages per professional group
    - Past presidents get to recruit new board members
    - Identifying new leaders
  - Organizing for the year – content of programs and speakers (content drives membership)
    - Get top-level speakers
    - NAEPC can provide speakers – see website
    - Establish an annual or event theme with specific topics/speakers (may limit your speaker resources)
- Bylaws – update bylaws
- AEP
  - Are there programs to nominate AEPs?
  - Social-in-a-box – to introduce potential members to AEPs and drive membership
  - Introduce AEPs at yearly meetings
  - Lower membership fee for AEPs
  - Encourage associate / emerging members (the younger members)

Suggestion: have a NAEPC board liaison available to help councils with leadership issues.