

# CHAPTER FORMATION AND GOOD STANDING CHECKLIST

FY2010/2011

## PRESIDENT

1. Chapter President signs the chapter agreement
2. Chapter renews at 86 percent by 1 July
3. Chapter holds a Strategy Summit within six months of formation and then bi-annually
4. Core board positions (President, Membership, Learning, Forum, Communications) are in place with no multiple positions
5. Current chapter bylaws are on file with EO
6. President-Elect is named before 1 November
7. Both President and President-Elect attend the annual Presidents' Meeting
8. Chapter holds monthly board meetings and records minutes
9. At least four chapter board members attend the GLC, including President or President-Elect
10. Average Member value within the chapter is 7.5 (out of 10) or greater on All Member Survey

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## LEARNING

1. Chapter holds at least three business or personal development learning events in first six months of chapter formation and at least six in each fiscal year
2. Chapter learning calendar is planned out and posted on EOaccess three months in advance (by 15 September and 15 March)
3. Chapter tracks event attendance at learning events
4. Chapter enters speakers in EO Speakers Database
5. Chapter achieves 7.0 (out of 10) or higher in chapter learning satisfaction on the All Member Survey

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## FORUM

1. At least 90 percent of the chapter is Forum trained
2. At least 90 percent of new members are placed in a Forum within three months
3. Chapter has three complete Forums

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## COMMUNICATIONS

1. Chapter must have a monthly newsletter
2. At least 35 percent of members respond to All Member Survey
3. Utilize and update EOaccess quarterly

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## FINANCE

1. Chapter is set up as a legal not-for-profit or non-governmental organization entity, according to that country's laws
2. A separate bank account in the chapters name is established and maintained
3. Chapter dues are collected from members once chapter board positions are filled and calendar is established
4. At least 30 percent of members signed up for auto-renewal if applicable
5. Local dues are set at no less than US\$1,000
6. Current fiscal year budget is on file with EO
7. Budget is in place for chapter retreat, Presidents' Meeting, Strategy Summit, GLCs

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## MEMBERSHIP

1. Chapter has more than 25 members after one year of formation and by 30 June each subsequent year
2. Chapter uses approved member integration process
3. At least 40 percent of chapter members have completed a Member Exchange profile

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## CHAPTER NAME