



# Chapter Formation Guidebook

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A symbiotic and dynamic relationship  
between member leadership and  
professional management

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FY2017/18

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# The Entrepreneurs' Organization Value Proposition

With 163 chapter locations in 52 countries, EO supports leading entrepreneurs in all corners of the world. Chapters provide EO members with a local resource to learn and grow, including access to executive education events, networking opportunities and mentorship programs. EO chapters also help strengthen the global business landscape by partnering with local businesses and encouraging job growth.

Founded in 1987, we serve as a catalyst for global economic growth, fueled by our commitment to nurture entrepreneurship globally and transform the lives of those entrepreneurs who transform the world.

# Part 1: Discovery

## 1.0 IDENTIFY LAUNCH CITY

- Launch Expert and Staff Director to evaluate location based on market demographics. Key factors to consider when identifying a target city are:
  - Ease of doing business in country and establishing a legal chapter entity
  - Population size is > 1 million and can yield a 50-person chapter within three years
  - Source potential collaborators such as sister organizations, financial institutions, government agencies, and entrepreneurial thought-leaders
- Hold a “Discovery Event” to engage the community and communicate intent to establish an EO entity in the identified location. (See page 20 for a sample Discovery Event agenda.)

## 1.1 WHEN IN AN EXISTING EO MARKET

A multi-chapter or second-chapter city will have a core team of four to eight members in good standing from a mature parent chapter to serve as new chapter champions. These members will transfer their membership to the new chapter once it is formed and serve as founding Board members. A core team of seeding members will co-create and sign a Memorandum of Understanding (MOU) with the parent chapter. Key factors to consider when starting a neighboring second chapter:

- Chapter name
- Recruitment parameters
- Event collaboration and participation
- Local chapter administrator co-sharing (See page 36 through 42 for a sample MOU.)

## 1.2 FUNDING FOR THE CHAPTER LAUNCH

Each EO region is to have an assigned Launch Expert who is the senior-level strategic resource for start-up chapters. The Launch Expert, along with designated launch staff, must submit a plan for allocating EO resources to the chapter launch via a Regional Launch Grant application.

- Regional Launch Grant provides US\$7,500 to invest in start-up efforts and pays out US\$15,000 for each chapter launched in the region with an additional US\$5,000 bonus to the chapter upon reaching 25 members within six months of forming the new chapter. (See page 54 for the grant application.)

# Part 1: Discovery (Continued)

## **1.3 COMMUNICATION AND AWARENESS** (needed from the comm. team)

- Insert plan for external communication in X location
  - Include PR and marketing strategy from the professionals on staff and current member committee. Detail plan of outreach for location with no chapter entity.
  - Include social media campaign blitz.
- Internal communication broadcast to EO community of intent to form a chapter in said location
  - EOupdate
  - All leadership trainings to include slide about target location
  - Global leadership planning meetings to include slide about target location
  - Regional updates from Communications Director and Launch Expert to include target location and progress
  - Additional build-out from communications team

# Part 2: Engagement

## 2.0 IDENTIFY PARTNERS AND AFFILIATES TO SUPPORT THE EFFORT

Once a location meets the criteria, hold a “Discovery Event” to engage the local entrepreneurial ecosystem. This event is to consist of:

- Those who are considered thought-leaders by business owners, such as leaders of industry
- Universities and colleges with entrepreneurial programs
- Those who might provide meeting space where entrepreneurs can gather
- Government officials such as the Ministry of Finance or Commerce and Economic Development
- Local entrepreneurs

It is recommended, but won't prohibit the launch, to establish a collaboration agreement such as a Memorandum of Understanding with two (2) partner organizations who support entrepreneurship and who share values with EO.

## 2.1 ASSESSMENT OF POTENTIAL LAUNCH CANDIDATES

Candidates gathered from Global communications efforts and partnerships are to be assessed for champion selection and core team creation. The Staff Lead is to coordinate and perform a joint interview with candidates and a member from the organizational growth committee and the Launch Expert. Key factors to consider when selecting a champion:

- Membership qualification
- Ties to the local community
- Influence among peers
- Bandwidth to lead the launch locally (See page 19 for champion assessment interview questions.)

Qualified candidates are to complete a regional At-Large Application for membership and submit an Income Verification Form prior to designation as champion or core team member.

- If a candidate meets EO membership criteria but does not meet the champion criteria, they can become an EO Global member and enjoy Global benefits as a member At-Large until a champion emerges.

# Part 2: Engagement (Continued)

## 2.2 CORE TEAM

A Core Team consists of three to five local, in-market members. Their roles include a champion to spearhead the launch and co-champions to conduct recruitment and communication. The Core Team is expected to attend leadership training events such as Presidents' Meetings, GLC and any regional or area events as appropriate. Portions of the Launch Grant are to assist with exposing the Core Team to EO culture and help with in-market events and activities.

Support for the Core Team consists of regularly scheduled calls with the Launch Expert and Staff Lead to:

- Clearly lay out milestones for the launch effort
- Assess progress of the launch
- Assist with evaluation of local member candidates
- Mentor, engage and inspire
- Integrate with area, regional and global resources
- Engage with champions and Core Team members from around the world

# Part 3: Growth in Market

## 3.0 SOURCES FOR BUILDING MEMBERSHIP

The Global Communications Department is to engage with E-public to garner awareness and generate prospects for the launch effort; prospective members as well as partners and affiliates will help to support start-up efforts in the target market. Other sources for building prospect pipeline:

- Affiliate and partner referrals
- Referrals from EO membership base
- Core Team members' sphere of influence

The Core Team is primarily responsible for building the local membership base by nominating candidates and enlisting new members. Recruitment success depends upon how well the Core Team understands our mission and can relay EO's value proposition.

- Local team to develop a prospective member list
  - On average, 40 invitations produce 20+ attendees, resulting in six members
- Coordinate with EO's PR Director for media and marketing opportunities
- Leverage social media to announce intent to establish an EO chapter in the market
  - Facebook, LinkedIn, blogs, business or community newsletters

## 3.1 LOCAL COMMUNITY EVENT RESOURCES

One key way to build the chapter is by hosting an impactful local event. Events are our primary way of showcasing member benefits, developing presence in the community, and obtaining additional support for the chapter launch. Possible event options:

- Option 1 – Casual, informational lunch-and-learn
- Option 2 – Hold a Test Drive
- Option 3 – Key speaker learning event
- Option 4 – Cocktail mixer associated with another entrepreneurial event in the city
- Option 5 – Q&A panel with EO member-leaders (See page 31 for a Test Drive example.)

➤ [Additional learning resources](#)

\*\*\* EO Global Learning to republish chapter learning resource page with toolkit

\*\*\* EO Global Learning to secure a speaker for region that commits to being available for a chapter formation event



# Part 3: Growth in Market (Continued)

## 3.2 GLOBAL EVENT RESOURCES

When possible, the Entrepreneurs' Organization will support chapter launch efforts by scheduling a committee meeting or event in the target city. Examples of these events are:

- Global University
  - Regional, Area or Multi-Chapter Event
  - Leadership planning meetings and trainings
  - EO-sponsored awards or competitions, such as GSEA
  - Joint event with other prominent association or affiliate
- Growth in market takes an average of nine months. During that time, members are to join At-Large until the chapter takes shape with 16 members and the Core Team has transitioned into a local Board of Directors.

# Part 4: Chapter Formation and Approval

## 4.0 THE THREE “NEW CHAPTER” MODELS

In order to successfully obtain approval for the chapter formation and be recognized as an operating EO entity, regional leadership and staff are to adhere to the following procedures and subsequently submit for Global Membership Development Committee vote and Global Board ratification:

### ➤ Multi-Chapter

- Chapter with greater than 75 members seeks approval from appropriate committee and Global Board to establish from existing members a neighboring chapter of 25 members or more
- Renewal level for chapters seeking multi-chapter approval must be 85 percent or greater
- Local board must be completely separate from parent Chapter Board
- Chapter application and agreement forms required per our Policies and Procedures (P&Ps)

### ➤ New Market

- Champion and Core Team have grown in market to 16+ At-Large members
- Local Board of Directors is in place
- Chapter application and agreement forms completed and submitted per our P&Ps
- Appropriate trainings scheduled

### ➤ Hybrid

- Core Team from mature chapter is identified to “seed” the new chapter
- Core Team grows in market adding 16+ new members
- Local Board of Directors is in place
- Chapter application and agreement forms completed and submitted per our P&Ps
- Appropriate trainings scheduled

The Regional Director, being a sitting member of the Global Membership Development Committee, is to put forward a motion to approve the chapter. The Committee then approves the chapter by majority vote in favor of the new chapter formation. Once the Global Membership Development Committee approves, the Global Board liaison to the Global Membership Development Committee is to move forward and petition for the approval of the new chapter from the Global Board. The new chapter is then ratified by majority vote.

In the event that the voting must take place electronically, both the Global Membership Development Committee and Global Board are to approve the new chapter formation by Unanimous Written Consent (UWC) within 48 hours of each receiving the petition for approval. (See page 43 for the Chapter Launch Application and Agreement Forms.)

# Part 4: Chapter Formation and Approval (Continued)

## 4.1 BROADCASTING THE CHAPTER LAUNCH

The protocol for communicating a chapter launch is as follows:

- Chapter is switched from “coming soon” status on our IT platform to “active”
- The Regional Director sends a formal communication to all council members, the Global Board, committee and task team leaders, and any other special contributors, announcing the chapter launch
- The Global Membership Development Director sends internal staff communications about the approved chapter launch
- Staff Director who guided the chapter launch to fruition writes a short blurb for inclusion in EOupdate and Leadership News
- The EO Communications Department uses the appropriate medium for internal and external notifications to broadcast the chapter launch and updates materials and website for accuracy

# Part 5: Chapter Integration

## 5.0 NEW CHAPTER SUMMIT

The New Chapter Summit (NCS) is to take place after the chapter has launched officially with 16 new members and has selected a Board of six to eight officers (President, Forum, Membership, Learning, Finance and Communications are required positions; a local chapter administrator is strongly encouraged). The purpose of the NCS is to provide basic Board training on roles and responsibilities and help them develop a strategic vision and direction for their new chapter. This training is a critical step in laying the foundation for a new EO chapter. During this training, the chapter is to receive templates for bylaws, budgets, Board meetings as well as a sample Forum constitution.

(See page 17 for the Chapter Launch Checklist.)

- Payment for the New Chapter Summit comes from two sources. 1. The Strategy Summit Committee, by providing a 50 percent discount for administering the program. 2. The Chapter Launch Grant that is paid to the region upon launching the new chapter.

## 5.1 SUPPORT FROM STAFF EXPERTS AND VOLUNTEER LEADERSHIP

During the New Chapter Summit, chapter leaders will have the opportunity to meet their key primary staff person who will help them integrate into their EO Area/Region. This will be either a Chapter Manager or Area Manager. This person is to be the Global liaison for the chapter. Their responsibilities include coordinating with the appropriate staff expert or personally implementing individual follow-up trainings on EO's web-based portal for each member-leader within 30 days of the New Chapter Summit. Additional responsibilities include:

- Review the chapter's profile and ensure officers are accurately reflected
- Educate the chapter on the appropriate use of logo, fonts and images in their communications
- Ensuring local Board is fully engaged with respective Regional Council members and member-leaders
- Set up a Strategy Summit six to 12 months after date of launch
- Verify that all new members attend a Global benefits webinar
- Create a timeline to reach 25 members, full chapter status
- Collect bylaws and financial templates within 90 days of chapter approval
- Plan for the annual Global Leadership Conference
  - Obtain commitments from Board members
  - Chapter has set aside a budget for travel
- Ensure that grant funds are properly allocated for new chapter needs

# Part 5: Chapter Integration (Continued)

Peer accountability is a key tenet of the organization and a primary way of helping each other succeed in leadership roles by way of knowledge transfer achieved through a series of mentor relationships. Each chair position on the local Board receives the benefit of having peers in their area and a member-leader mentor and staff expert to support their success. Here is an outline for each:

- Forum Chair – the Forum Director will help you...
  - Create a Forum constitution
  - Set up Forum and Moderator Training for your chapter
  - With placement, reporting and accessing Forum tools
  - Connect with other area Forum Chairs
- Learning Chair – the Learning Director will help you...
  - Create a learning calendar
  - Access speakers
  - Access Global Universities, Regional Events and other Global Learning Programs
  - With event ideas and budgeting
  - Connect with other area Learning Chairs
- Communications Chair – the Communications Director will help you...
  - Create a plan for communicating pertinent information to your chapter
  - With internal and external communications strategies
  - Tap into best practices of other area Communications Chairs
  - Connect with the EO universe
- Membership Chair – the Membership Director will help you...
  - With recruitment strategies
  - With event ideas and budgeting
  - Access Global resources
  - Tap into best practices of other area Membership Chairs
  - Integrate new members

# Part 5: Chapter Integration (Continued)

- Strategic Alliance Chair – the Strategic Alliance Director will help you...
  - Create alliance packages
  - Access area, regional and Global sponsors and partners
  - Tackle challenges with securing local sponsors
  - Tap into best practices of other area Strategic Alliance Chairs
- Chapter President – the Area Director will help you...
  - Attain milestones in the New Chapter Checklist
  - Create a Board accountability system
  - Stay focused and energized
  - Access Global resources
  - Connect with other area Presidents
- Finance Chair – the Finance Director will help you ...
  - Create a local budget
  - Establish a chapter bank account
  - Access best practices of other chapter Finance Chairs
  - Create chapter governance policies and bylaws

## 5.2 FORUM

Once a local team of 12 members or more have joined, the staff advancing the launch will reach out to the Forum team to schedule training for roughly 45 days in the future. The local leaders are to use this target date to advance the launch and recruit the remaining four or more members to meet the chapter formation requirements. During that 45-day period leading up to Forum training, the local group will hold a series of one-on-one meetings with member candidates joining as part of the founding 16 members. Standard procedure for scheduling a Forum training applies. It is recommended to have two back-to-back trainings with the same facilitator to train all new members. The Forum trainer will:

- Provide a basic level of moderator training
- Assist the Forum Chair with moderator selection and placement for new members
- Discuss securing an Advanced Forum Series in four months to check on Forum health

# Part 5: Chapter Integration (Continued)

- Payment for the Advanced Forum Series is to come from two sources. 1. The Forum Committee, by providing a 50 percent discount for administering the program. 2. The Chapter Launch Grant that is paid to the region upon launching the new chapter.

## 5.3 GOVERNANCE PERTAINING TO NEW CHAPTER FORMATION

### ➤ **Registering as an Entity**

- The chapter must register as a non-profit organization
- The chapter must have bylaws
- The chapter must have the ability to hire people
- The chapter must have the ability to collect money from dues, sponsorship and other means
- The chapter must have the power to sign agreements and organize events
- The chapter must have a Board or executive body
- The chapter must have a President
- The chapter should obtain assistance from a local law firm or a member to give appropriate advice. In some chapters, a lawyer who is a member has assisted in this capacity.

Registration as an entity must be completed within 90 days of organizing with a member body of 16 and a local Board with a chapter President.

### ➤ **Registered Trademarks**

The local chapter should NOT register a local trademark. The trademark is registered by EO Global or a parent entity in pre-designated countries or cities. The Governance Director, who reports to the Senior Vice President of Global Resources, will review the monthly chapter launch update and work with the Governance Committee to ensure timely filing.

### ➤ **Bylaws**

According to local law, the bylaws shall have:

- An organizational structure (members, Board, President, accounts)
- Duties and powers of members, board and president
- Reference to EO Global and respect for EO Global rules
- Clearly stated rules on how to accept and expel members
- Due process rules
- Conflict of interest rules

# Part 5: Chapter Integration (Continued)

- Confidentiality
- Non-solicitation
- Dispute resolution rules

In the event that the local law does not permit inclusion of all of these matters, the local Board should issue a resolution including them. This must be completed within 90 days of organizing with a member body of 16 and a local Board with a Chapter President.

The Governance Committee will review the bylaws for accuracy and verify they contain the required elements. A local attorney should also review the bylaws to ensure that they are compliant with the governing rules of the country/city in which the chapter is registered as an EO entity.

- The local Board is expected to attend the Global Leadership Conference to receive practical tools and more extensive officer training in support of chapter operations.

## 5.4 HOLD AN INAUGURAL EVENT

In order to celebrate the successful launch of the new chapter, local members are to hold an inaugural event. This event should showcase chapter members and be executed in a way that makes a statement in the community and establishes the chapter with prominence. Elements to consider when planning an inaugural event:

- Include a prominent speaker
- Exclusivity of venue
- Open to spouses
- Open to prominent members of the community
- Open to sponsors, associates, partners and affiliates
- Open to member candidates
- Includes networking opportunities
- Involves local media and press

EO member-leaders from the Area and Region are to attend the inaugural event. This can be the Area Director, Regional Director or other committee and task team leaders as assigned.

- Payment for the Inaugural Event is to come from two sources. 1. The Chapter Launch Grant that is paid to the region upon launching the new chapter. 2. Regional discretionary budget and or specified line-item budgets such as Membership or Learning.



# Part 6: Toolkit

## 6.0 CHAPTER LAUNCH CHECKLIST

### Discovery

- ✓ City population greater than one million or that has a chapter of 50+ members in three years
- ✓ Sister organization identified in the community
- ✓ There are three partner entities identified to support a local discovery event
- ✓ Multi-Chapter – There is a Core Team identified to spearhead launch from parent chapter
- ✓ Multi-Chapter – Memorandum of Understanding (MOU) signed between parent chapter and champions
- ✓ EO Launch Expert applies for Launch Grant Funding
- ✓ Plan Discovery Event to engage the entrepreneurial ecosystem
- ✓ Communications Director notified to deploy internal and external awareness campaign

### Engagement

- ✓ When applicable, do we have the support of the Department of Economic Development and Commerce, Ministry of Finance?
- ✓ Memorandum of Understanding (MOU) signed by EO and at least two partner organizations
- ✓ Application and income forms sent to pool of champion candidates to be returned in seven business days
- ✓ Complete interviews and assessment of potential champion candidates and Core Team
- ✓ Process champion and Core Team as members At-Large
- ✓ Champion/Core Team to attend an EO event
- ✓ Plan local high-impact event with Core Team and partners

### Growth

- ✓ Aggregate lead sources to target 100 pre-qualified entrepreneurs
- ✓ Set a target date to launch
- ✓ Strategic Communications to alert local media of EO's value proposition and further engage E-public
- ✓ Hold local high-impact launch event to include 40 pre-qualified prospects
- ✓ Follow-up post event to grow champion and Core Team to 16 members

# Part 6: Toolkit (Continued)

- ✓ Execute additional events as needed to launch chapter
- ✓ Core Team, with guidance from the Launch Expert, will assess local candidates and approve for membership

## **Chapter Formation – Multi-Chapter**

- ✓ Parent chapter is at 75 members or greater
- ✓ Chapter has incubated at least 25 members to establish a second chapter in market
- ✓ Second chapter to have separate Board with at least six officers
- ✓ Creation of second chapter will not diminish either entity to below the minimum standards set for the organization
- ✓ Signed chapter application and agreement form required for newly launched chapter

## **Chapter Formation – New Market**

- ✓ Location has grown to 16 paid EO members
- ✓ Launch Expert assists with the identification of local Board of Directors
- ✓ Signed chapter application and agreement forms submitted
- ✓ Appropriate trainings scheduled including Forum and New Chapter Summit

## **Chapter Formation – Hybrid**

- ✓ Core Team from mature parent chapter
- ✓ Recruit a minimum of 16 new members
- ✓ Local Board of Directors in place
- ✓ Signed chapter application and agreement forms submitted
- ✓ Appropriate trainings scheduled including Forum and New Chapter Summit

# Part 6: Toolkit (Continued)

## 6.1 CHAMPION ASSESSMENT INTERVIEW

### Champion Qualities

- **A Leader Among Leaders** - this person should be well-connected in their community and able to mobilize others to action.
- **Competitive** - thrives on challenge and wants to stand out and be known.
- **Futuristic** - the kind of person who loves to peer over the horizon and see in detail what the future might hold and is propelled to achievement.
- **An Architect** - someone who creates plans and oversees the desired results, enjoys building things from the ground up.
- **A Developer** - intuitive about people and genuine in their interactions, this person would enjoy fostering an environment to engage other leading entrepreneurs in the area

### Examples of Champion Vetting Questions

1. Do you have the time to commit to (x) in the year ahead?
2. How well-connected are you?
3. Why do you want to be the champion; why should we pick you?
4. Is there a benefit you expect to receive for being a founder?
5. Do you enjoy starting new ventures?
6. What other organizations do you volunteer with?
7. What kind of leadership role do you hold within other organizations?
8. What are your values, what motivates and drives you?
9. How old is your business?
10. Are you deeply involved in the daily activities of the company or are you more the idea person or strategic visionary who has others manage details?

# Part 6: Toolkit (Continued)

## 6.2 SAMPLE EVENT AGENDA

TIME	ITEM
11:25 a.m.	Doors open, name tags out, photo show running on screen. Prospect kits and materials on tables
11:30 a.m.	Prospects arrive, general meet-and-greet
11:45 a.m.	Direct attendees to be seated (stop photo show)
11:50 a.m.	Official Welcome – Delivered by (EO Member or Champion or Host) <ul style="list-style-type: none"> <li>- Value proposition of EO, mission, vision, values</li> <li>- Host shares personal story of what brought them to EO</li> <li>- Ask a prospect or two to share what they are looking to gain from membership, what has brought them to EO</li> </ul>
12:15 p.m.	Options for main event <ul style="list-style-type: none"> <li>- Panel Discussion Q&amp;A</li> <li>- Keynote Speaker</li> <li>- Test Drive</li> </ul>
12:45 p.m.	Benefits of Membership Delivered by (EO Member or Champion or Host) <ul style="list-style-type: none"> <li>- Powerpoint presentation with three pillars</li> <li>- Share personal story on one or two EO benefits</li> </ul>
1:00 p.m.	What it takes to join – the close–delivered by (EO Member or Champion or Host) <ul style="list-style-type: none"> <li>- Applications are inside the folders on table</li> <li>- Opportunity to be a founding member of chapter</li> </ul>
1:30 p.m.	Conclude <ul style="list-style-type: none"> <li>- Collect applications and business cards</li> </ul>

# Part 6: Toolkit (Continued)

## 6.3 LOCATION ASSESSMENT - FINLAND TEST DRIVE

Dennis Vilovic, Business Development Director EMEA

### RATIONALE

Entrepreneurs' Organization (EO) is currently looking into expanding its outreach to the Nordic countries in Europe. In order to support this motion, the Global Board has planned a Board Meeting from 23 through 27 July in Helsinki, Finland. Having the resources of our nine top member-leaders available in a country which currently has no EO activity is a great opportunity for conducting a recruitment event.

As a result, a desk study combined with a field visit in Helsinki was completed by the Business Development Director EMEA in order to identify key organisations and entrepreneurs. The methodology, outcome and path forward from the assessment is presented in this report.

### METHODOLOGY

The Chapter Launch Assessment followed the methodology outlined in Figure 1. It contains four different steps:

#### I. DESK STUDY

The rationale of the desk study is to use publicly available information about a country/city to assess whether the location would have potential for an EO chapter. This task is accomplished mainly through three different activities:

##### A. RESEARCH BASIC ECONOMIC / POLITICAL DATA

There are some basic economic and political indicators which can help evaluate the entrepreneurial ecosystem in a country and/or a city. Sole indicators such as population are only of limited value in order to assess entrepreneurship. When researching economic data, one should not forget to research business culture. Some countries have a much more collaborative way of doing business than others. This may help the introduction of EO into a new country because entrepreneurs are used to organisations, associations and other networking forums. For example, countries like Romania, Bulgaria, Serbia and Estonia may be more receptive toward EO than countries like France because of the non-availability of learning events for entrepreneurs. Most of the new economies have a limited availability of events focused on high-level speakers and mentor opportunities. All those aspects should be considered when doing the economic and political desk study. Good sources for economic data can be found at OECD, IMF, WorldBank and other international organizations.

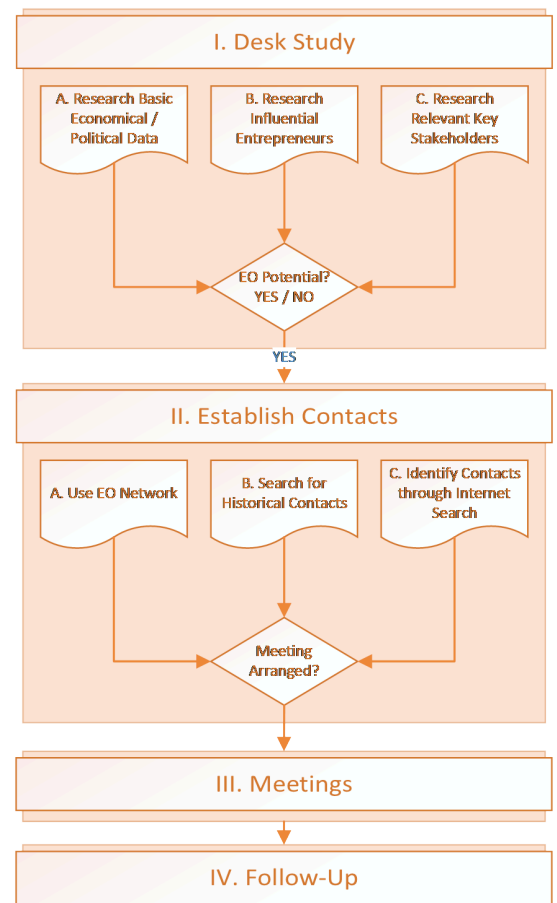


Figure 1 - Assessment Methodology Used

# Part 6: Toolkit (Continued)

## B. RESEARCH INFLUENTIAL ENTREPRENEURS

It is beneficial to understand which business sectors within an economy are strong. Did you know that three of the four best-selling games from the Apple Store are produced by companies based in Finland? Researching well-known companies will allow you to identify the owners. Normally, these people are influential entrepreneurs and may have had more experience with events and activities related to learning and growing, and will thus be more receptive toward EO. Contacting these people is clearly more challenging but due to the availability of information through LinkedIn and the internet in general, there are ways of approaching them.

Table 1 - Identified Influential Entrepreneurs in Finland

No.	Name	Job Title	Link
1	Sophia Jansson	Owner, Moomin Characters Ltd	<a href="https://www.linkedin.com/profile/view?id=579215&amp;goback=">https://www.linkedin.com/profile/view?id=579215&amp;goback=</a>
2	Henrik Ehrnrooth	President and CEO at KONE	<a href="https://www.linkedin.com/profile/view?id=108224489&amp;goback=">https://www.linkedin.com/profile/view?id=108224489&amp;goback=</a>
3	Kare Casals	President at Business Meeting Park Ltd.	<a href="https://www.linkedin.com/profile/view?id=183352&amp;goback=">https://www.linkedin.com/profile/view?id=183352&amp;goback=</a>
4	Petri Saarinen	Non-Executive Advisor at Mergers, Acquisitions & Funding	<a href="https://www.linkedin.com/profile/view?trk=contacts-contacts-list-contact_name-0&amp;id=1809974">https://www.linkedin.com/profile/view?trk=contacts-contacts-list-contact_name-0&amp;id=1809974</a>
5	Taneli Tikka	Entrepreneur Decathlete	<a href="https://fi.linkedin.com/in/taneli">https://fi.linkedin.com/in/taneli</a>
6	Ville Miettinen	Serial Entrepreneur; Founder and CEO, Microtask	<a href="https://fi.linkedin.com/in/wilihybrid">https://fi.linkedin.com/in/wilihybrid</a>

The entrepreneurs listed in Table 1 have been identified as influential entrepreneurs. All of them have been contacted through different means such as LinkedIn or email.. Unfortunately, the response has been disappointing. A future approach should include Senior EO Staff with large networks on LinkedIn in order to identify any potential first and/or second degree connections.

## C. RESEARCH RELEVANT KEY STAKEHOLDERS

The biggest challenge in launching a new chapter is creating a list of potential prospects. Ninety percent of all EO members join through referrals. The same concept can be adapted for chapter launches. Cooperating with organizations dealing with entrepreneurs (Chambers of Commerce, Funding Agencies, Commercial Offices, Think Tanks, Incubators, etc.) is a great way of up-scaling accessibility to entrepreneurs. Those institutions are normally well connected within the local entrepreneurial scene. It can be of great value to EO for connect with and be able to distribute information through their networks.

This also includes a meeting with embassies in your host country. For example, arranging a meeting with the Finnish Embassy in Kenya can glean valuable contacts to individuals and/or organisations dealing with entrepreneurs in Finland. Commercial offices in foreign embassies are tasked with supporting trade between the host and their home country. Normally, they support companies visiting the host country. In other words, they have contacts with companies (and thus entrepreneurs) in their home countries. Since they are supporting trade and economic development, they are normally very open to meeting with EO and providing contacts in their home country.

## Part 6: Toolkit (Continued)

The following institutions have been identified for Finland:

No.	Name	Type	Link	Comments
1	Enterprise Helsinki	Network	<a href="http://www.yrityshelsinki.fi/en">http://www.yrityshelsinki.fi/en</a>	Enterprise Helsinki provides advice and assistance on establishing a business
2	Helsinki OpenCoffee Meetup	Event	<a href="http://www.meetup.com/opencoffee-helsinki/">http://www.meetup.com/opencoffee-helsinki/</a>	OpenCoffee Club is an initiative started in London by Saul Klein of Index Ventures, and has now landed in Helsinki. OpenCoffee Club is a simple but powerful idea—have a fixed time and place where entrepreneurs, investors, developers and visionaries interested in startups can get together in a truly informal setting to meet, chat and make connections. Come enjoy the relaxed atmosphere and meet other entrepreneurs and investors, swap business cards and watch your personal business directory grow!
3	Hyny	Network	<a href="http://www.yrittajat.fi/">http://www.yrittajat.fi/</a>	Hyny (Young Entrepreneurs of the Regional Organisation of Enterprises in Helsinki) is an informal network for young entrepreneurs under age 40 in Helsinki. For its members, Hyny provides training, events and networking opportunities for free. You don't necessarily need to be a member of Regional Organisation of Enterprises in Helsinki, you can also join the Hyny mailing list and access all the fun and useful events we have.
4	German Chamber of Commerce	Support Organisation	<a href="http://www.dfhk.fi/">http://www.dfhk.fi/</a>	German commercial office of the Embassy
5	Inventure	Venture Capital	<a href="http://www.inventure.fi/">http://www.inventure.fi/</a>	Inventure is a leading early-stage venture capital company in the Nordics. Over the past 10 years we have been working with some of the best entrepreneurs in Finland, the Nordics and the Baltics, supporting innovative startups and high-tech companies. We are continuously looking for the brightest ideas to turn them into global superstars.
6	FVCA	Venture Capital	<a href="http://www.fvca.fi/en">http://www.fvca.fi/en</a>	The Finnish Venture Capital Association was established in 1990. The actual members of the association are entities acting in the Finnish private equity and venture capital markets. FVCA accepts as its associate members communities or private individuals who play a part in the development of industry in Finland. The number of members at the moment is 50 full and 49 associate members.

## Part 6: Toolkit (Continued)

7	Nexit	Venture Capital	<a href="http://www.nexitventures.com/">http://www.nexitventures.com/</a>	Nexit Ventures is a venture capital company with its home bases in the Nordic countries and Silicon Valley—the focal points of mobile technologies. This dual presence creates a unique transatlantic bridge and brings significant value to our portfolio companies.
8	Helsinki Think Company	Forum	<a href="http://thinkcompany.fi/">http://thinkcompany.fi/</a>	Helsinki Think Company, recently opened at Vuorikatu 5, is a city-centre forum for new entrepreneurial activities. It is a communal workspace where students, researchers and entrepreneurially minded individuals can build networks.
9	NewCo Factory	Incubator	<a href="http://www.yrityshelsinki.fi/en/growth-business-services/newcofactory">http://www.yrityshelsinki.fi/en/growth-business-services/newcofactory</a>	Enterprise Helsinki NewCo Factory supports startups with international growth potential by providing business coaching and services, helping to find talent for startup teams and organizing various types of events and meetups. We are part of the Uusimaa business incubator network.
10	Startup Sauna	Incubator	<a href="http://startupsauna.com/">http://startupsauna.com/</a>	Startup Sauna accelerator helps promising early-stage startups get ready to take the next step, be it entering their market or raising a seed round of funding. Our coaches are some of the most talented serial entrepreneurs, investors and other industry experts in Finland and the surrounding region.
11	Small Business Center - Aalto University	University	<a href="http://pienyrityskeskus.aalto.fi/en/">http://pienyrityskeskus.aalto.fi/en/</a>	<p>The basis for all operations at Small Business Center as a separate department of Aalto University School of Business is to widely promote entrepreneurship and produce diverse services to support the startup, development and expansion phases of businesses.</p> <p>The mission of Small Business Center is to operate in close collaboration with the school of business and other schools at Aalto University to promote entrepreneurship by fostering services and development and testing new operating models.</p>
12	The Regional Organisation of Enterprises in Helsinki	Support Organisation	<a href="http://www.yrittajat.fi/fi-FI/helsinginyrittajat/in-english/">http://www.yrittajat.fi/fi-FI/helsinginyrittajat/in-english/</a>	The Regional Organisation of Enterprises in Helsinki is one of the 21 regional organizations of the Federation of Finnish Enterprises. In Finland, we have in total more than 116,000 members (in Helsinki more than 6,700 members). Our federation promotes the interests of enterprises with the government, ministries, parliament and major interest organizations, nationally and within the EU.



## Part 6: Toolkit (Continued)

13	Slush	Support Organisation	<a href="http://www.slush.org/">http://www.slush.org/</a>	Slush is the focal point where startups and tech talent meet with top-tier international investors, executives and media. In 2014, Slush brought together over 14,000 attendees and more than 3,500 companies for its two-day event. Slush is a non-profit event organized by a community of entrepreneurs, investors, students and event production professionals. Slush has grown from a 300-person gathering to become one of the leading events of its kind.
14	The Women Entrepreneurs of Finland	Support Organisation	<a href="http://www.yrittajanaiset.com/index.php?k=3979">http://www.yrittajanaiset.com/index.php?k=3979</a>	The Women Entrepreneurs of Finland (Suomen Yrittäjänaiset) was founded in 1947. The goal of the Association is to promote the economic, social and operating conditions of women entrepreneurs. At present, the Women Entrepreneurs of Finland has more than 70 member associations and about 7,000 individual members.
15	Tekes	Funding	<a href="http://www.tekes.fi/en/tekes/">http://www.tekes.fi/en/tekes/</a>	Tekes is one of the most important publicly funded expert organisations for financing research, development and innovation in Finland. We boost wide-ranging innovation activities in research communities, industry and service sectors.
16	Finnvera	Funding	<a href="http://www.finnvera.fi/eng/Finnvera">http://www.finnvera.fi/eng/Finnvera</a>	Finnvera is a specialised financing company owned by the State of Finland. It provides its clients with loans, guarantees, venture capital investments and export credit guarantees. Finnvera is the official Export Credit Agency (ECA) of Finland.
17	Finncham	Network	<a href="http://kauppakamari.fi/en/international/">http://kauppakamari.fi/en/international/</a>	We promote internationalisation, clear trade obstacles, influence international agreement systems, and support investment initiatives made by enterprises. Our networks reach all four corners of the globe. In addition, the chambers of commerce serve companies with the documentation necessary for foreign trade.
18	Sitra	Funding	<a href="http://www.sitra.fi/en/about-sitra">http://www.sitra.fi/en/about-sitra</a>	Sitra is a public fund aimed at building a successful Finland for tomorrow. We are forward-thinking and anticipate social change and its effect on people. Our activities promote new operating models and stimulate business that aims at sustainable well-being.
19	Vigo	Funding	<a href="http://www.vigo.fi/frontpage">http://www.vigo.fi/frontpage</a>	Vigo is a new type of acceleration program designed to complement the internationally acclaimed Finnish innovation ecosystem. The program bridges the gap between early stage technology firms and international venture funding.
20	Industry Investment	Funding	<a href="http://www.industryinvestment.com/">http://www.industryinvestment.com/</a>	Finnish Industry Investment Ltd. is a government-owned investment company. We promote Finnish business, employment and economic growth through venture capital and private equity investments

# Part 6: Toolkit (Continued)

12	Enterprise Finland	Government	<a href="http://www.yrityssuomi.fi/en/home">http://www.yrityssuomi.fi/en/home</a>	Government support for entrepreneurs
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## II. ESTABLISH CONTACTS

In order to identify and establish contacts, there are different approaches. A combination of the following has been used:

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### A. USE EO NETWORK

In order to leverage the existing Finnish network of EO members across Europe, the Chapter Launch Director for Europe sent an email to all current and incoming Presidents asking about concrete contacts for a potential chapter launch in Finland. There has been some response, however, the use of EO's network should be further analysed.

No.	Name	Company	Email
1	Marika Osterloff	Finnish Venture Capital Association	marika.af.enehjem@fvca.fi
2	Ville Saarikale	Nordic Business Forum	Ville.saarikalle@nbforum.com

A meeting with Ville has been held, however, Marika did not respond to any of the emails.

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### B. SEARCH FOR HISTORICAL CONTACTS

In the past, a prospect from Finland has approached EO. This person has been contacted again and we requested a meeting.

No.	Name	Email
1	Terro Sarkkinen	tero@basemark.com

We contacted Terro again and he showed interest in our activities. Unfortunately, he was out of the country during our field visit. Nevertheless, he should be contacted during the preparation of EO's event in July.

# Part 6: Toolkit (Continued)

## C. IDENTIFY CONTACTS THROUGH INTERNET SEARCH

The most difficult way of contacting prospects is through a non-referral-based communication. Following the desk study on influential entrepreneurs, a number of people have been contacted via email and/or LinkedIn. Unfortunately, the response has been unsatisfying. This approach may need some further refinement in terms of our sales pitch.

No.	Name	Job Title	Email
1	Rick A. de Lambert	Senior Commercial Officer, US Embassy	Rick.DeLambert@trade.gov
2	Heli Jarvinen	CEO, The Women Entrepreneurs of Finland	heli.jarvinen@yrittajanaiset.fi
3	Timo Vuori	CEO, Secretary General, International Chamber of Commerce	Timo.Vuori@chamber.fi

Meetings with Rick and Timo have been held. Heli responded to our email and mentioned that she has been appointed to parliament. She provided contact information for the interim-CEO of The Women Entrepreneurs of Finland Organization, but that person declined our meeting request since they are currently in the process of hiring a new CEO. They should definitely be invited to EO's event in July.

## III. MEETINGS

### A. VILLE SAARIKALLE, PARTNER – NORDIC BUSINESS FORUM

The contact to Ville was established through an EO member from Europe (Ats Piirmets, EO Netherlands).

The Nordic Business Forum is a company based in Helsinki with offices in Estonia which organizes one of the biggest business events in the Nordic countries (<http://www.nbforum.com/nbf2015/>). This year, the event will host 5,500 guests mainly from Finland, Estonia and other countries in the region and will take place on 1-2 of October. Following EO's core value, they are also trying to execute once-in-a-lifetime events. Speakers for this year's event include: Ben Bernanke, Keith J. Cunningham, Garry Kasparov, Bjoern Wahlross, Nilofer Merchant, Guy Kawasaki, Arianna Huffington, John C. Maxwell and Simon Sinek.

The company only sells business-related events and has grown massively within recent years. The business model indicates that there is a lot of demand for learning events by Nordic entrepreneurs. Ticket prices for the Nordic Business Forum vary between 500 EUR and 3,000 EUR and sponsorship packages start at 25,000 EUR. The event was sold out within six days.

Ville recommended we meet with Suomen Yrittajaiset (Federation of Finnish Entrepreneurs).



# Part 6: Toolkit (Continued)

## KEY FINDINGS:

- One of the top business events in the Nordic countries with more than 5,000 participants this year.
- Biggest group of participants are Finnish entrepreneurs, followed by Estonian. Little participation from Swedish entrepreneurs.
- Event was sold out in six days with prices between 500 and 3,000 EUR, showing that there is a demand for business learning events.
- There were still tickets available for about 870 EUR if it were beneficial for EO to participate.

## B. RICK A. DE LAMBERT, SENIOR COMMERCIAL OFFICER – UNITED STATES EMBASSY HELSINKI

Contact with Rick de Lambert was established through an email sent to the commercial service of the U.S. embassy in Helsinki. In addition to Rick, the embassy wanted to have the Public Affairs Chief participate since he apparently deals regularly with entrepreneurial programs. Unfortunately, he was not available that day due to other commitments with the Ambassador.

The ambassador, Bruce J. Oreck, comes from an entrepreneurial family and as such is a strong supporter of trade links and entrepreneurship in Finland. He was appointed in 2009 and his tenure comes to an end any day now. The successor (Charles C. Adams, <http://www.allgov.com/news/appointments-and-resignations/us-ambassador-to-finland-who-is-charles-c-adams-jr-141013?news=854502>) has already been announced and only needs to be vetted by Parliament.

Finland is considered a valued partner to the U.S. and as such there are a lot of commercial support programs and ongoing activities.

Rick mentioned a number of organisations which are very active within the entrepreneurial ecosystem in Finland. Those are Aalto and Tampere University (very active in innovation and entrepreneurship) and Tekis (funding agency for innovation and startups). Rick offered to introduce us to Will Cardwell (<https://fi.linkedin.com/in/willcardwell>), an American entrepreneur resident in Finland and lecturer on entrepreneurship at Aalto University in Finland.

Rick mentioned that there are close business links with Estonia, which is only a two-hour ferry ride away. There is possibly an opportunity to combine Finland and Estonia via satellite Forums.

Talking about the Global Board Meeting and EO's plan of launching a chapter in Helsinki, the embassy is excited and will be very supportive. The month of July, however, is normally the vacation period which means that everybody (including entrepreneurs) will be up-country in their holiday homes. Nevertheless, we will try to host an event with representatives of key organizations.



# Part 6: Toolkit (Continued)

The American Embassy's building is eco-friendly and has received LEED platinum certification. It has meeting and event facilities which can host up to 40 people for a cocktail reception and/or presentations. The building is located in one of the most beautiful spots in Helsinki with great sea views. It could be a great location for an EO event.

At the meeting's conclusion, we determined that the Embassy is willing to help EO in establishing a chapter by introducing us to relevant key organizations and individuals. Rick mentioned that the embassy would definitely like to meet the Global Board during their meeting in Helsinki. The Embassy has close ties to the Finnish Chamber of Commerce.

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## KEY FINDINGS

- The American Embassy is very active in promoting entrepreneurship and will be very supportive in EO's activities.
- Rick could introduce us to Will Cardwell, an American entrepreneur and lecturer residing in Finland.
- The Embassy has great event facilities for up to 40 people which we could book for a small fee.
- The month of July is a challenge for organizing events since everybody will be on vacation.
- The Ambassador is very active in entrepreneurship but his tenure will come to an end any day now.

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## C. TIMO VUORI, SECRETARY GENERAL – INTERNATIONAL CHAMBER OF COMMERCE

The meeting with Timo Vuori was organized through an email sent to the Finnish Chamber of Commerce. Due to their Annual General Meeting, we only had about 30 minutes for a first meeting.

Timo is the Secretary General of the International Chamber of Commerce and the Vice President of the Finland Chamber of Commerce. He explained that the Finnish Chamber of Commerce works on a voluntary membership basis. That means that the chamber is also continuously striving to provide value to its members. He sees great potential for cooperation with EO. The Finnish economy is strong in Forestry, bio fuel, and the gaming industry.

Timo is excited about EO coming to Finland and is willing to support us. Talking about an event in July, he sees challenges but nevertheless we will try to get feedback from his members by mid-June.

At the meeting's conclusion, we determined that we would provide Timo with some general information about EO which he can discuss with his board and distribute to his members.

The image shows two business cards for Timo Vuori. The top card is for the International Chamber of Commerce (ICC), featuring the ICC logo (two globes) and the tagline 'The world business organization'. It lists contact information for the ICC Finland office: WTC Helsinki, Aleksanterinkatu 17, Box 1000, FI 00101 Helsinki. Contact details include phone (+358 9 4242 6238), mobile (+358 50 553 5319), and email (timo.vuori@icc.fi). The bottom card is for the Finland Chamber of Commerce (FINNCHAM), featuring the FINNCHAM logo (a gear with wings). It lists Timo Vuori as Vice President, International Affairs, and provides contact information for the Finland Chamber of Commerce: PO Box 1000, Aleksanterinkatu 17, FI-00101 HELSINKI, Finland. Contact details include phone (+358 9 4242 6238), mobile (+358 50 553 5319), email (timo.vuori@chamber.fi), and website (www.finncham.fi).

# Part 6: Toolkit (Continued)

Based on the feedback, he would advise us on what kind of event would be possible to organize in such a short time. In general, he mentioned that inviting representatives from organizations dealing with entrepreneurship will be much easier than getting a room full of eligible entrepreneurs.

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## KEY FINDINGS

- The chamber of commerce is ready to support EO and to closely cooperate with us.
- July is a difficult month for an event due to the holiday season.
- The chamber of commerce could be a valuable partner for EO and we may consider an official cooperation since the chamber is voluntary and is also pressured to provide continuous added value to its members.
- Finland's strong economic sectors are forestry, bio fuel, and the gaming industry.

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## IV. FOLLOW-UP ACTIONS

A number of follow-up actions have been generated by the Helsinki field visit:

- Provide background information about EO and its planned event to the Chamber of Commerce and American Embassy
- Organize call with the Public Affairs Chief of the Embassy to discuss entrepreneurship
- Establish contact with Will Cardwell
- Establish contact with Alto University and other key organizations
- Select event style and location ASAP, and start inviting participants
- Contact the embassies in Helsinki of the Global Board members' home countries
- Send an email to All EO Staff requesting potential leads to Finnish entrepreneurs

# Part 6: Toolkit (Continued)

## TEST DRIVE

Mock Forum Details/Timeline/Process

- Applications should be filled out prior to the event with a credit card number – have blank ones onsite to fulfill this if needed (ticket for entry is an application).
- Round tables work best with six to eight people per table if possible.
- Assigned seating for tables (who sits where to ensure a good mix is helpful – member-to-candidate ratio should be as close to one member for each four candidates as possible).
- Practice the Powerpoint review once it is updated with your chapter’s content.
- Additional handouts/materials (Membership folders from Global, overall membership chart, list of current chapter members, list of expectations (both ways), invitation to next chapter event).

## Welcome and Confidentiality Reminder

10 minutes	Introduction of Prospects and Members (name, business, tenure <i>if a member</i> and what is the most interesting thing about yourself that no one else in the room would know?)
30 minutes	Money and Time are the two “excuses” we hear – address it now YOU own your Experience in EO Entrepreneurship can be a wild ride ... video Introduction to EO – Local, Regional and Global *EO Value stories – define who will share “experiences” during the slide review (these should be members who can share deeply) <ul style="list-style-type: none"><li>- <i>Forum experience share</i></li><li>- <i>Path to Leadership experience share</i></li><li>- <i>Executive Education experience share</i><ul style="list-style-type: none"><li>- <i>Universities experience share</i></li><li>- <i>MIT EMP experience share</i></li><li>- <i>Bell Leadership Institute experience share</i></li></ul></li><li>- <i>Local Events – Multi-Chapter Events experience share</i></li></ul>

# Part 6: Toolkit (Continued)

- Member-to-Member Exchange experience share
- HealthNet experience share
- EO PressPass experience share
- Partners (Regus, Hertz, FedEx, Amex, Office Depot) experience share

5 minutes	Introduction to your chapter – Sponsors, Events and New Member Integration Process (what can they expect from you as a new member)
30 - 45 minutes	Introduction to Forum/Mock Forum – What is it? How does it function? – more experience sharing stories from other members  Mock Forum ( <i>set the tables prior to the event with a seating chart to make this flow if possible - six to eight per table or group for the Mock Forum</i> )  Confidentiality Reminder
2 minutes	Presentation Introduction and Expectations
1 minute per person	Each Person – one challenge (business or personal) – <i>start with a member to set the standard</i>
2 minutes	Group decides <i>who</i> will go deeper with a five-minute presentation on their topic – <i>pick a candidate to do the presentation, not a member</i>
5 minutes	More detailed presentation about the challenge presented to the group
1 minute	Silence (to prepare for clarifying questions)
1 minute per person	Each Person – Question and Answer – <i>go around the table and ask one question each and get the answer</i>
1 minute	Silence (to prepare for experience sharing)



## Part 6: Toolkit (Continued)

2 minutes per person	Experience Sharing – go around the table and speak from experience about the challenge
5 minutes	Take Away Value – the presenter should be keeping notes and at the end go person by person and remind them about what they learned
2 minutes	Summary of Mock Forum – what did you learn?
5 minutes	Q&A

\*Announce any next steps that you may need to – if there is a planned social event following the Test Drive, be sure to get people there.

\* Applications (everyone should have one filled out by now) – If you would like to pursue membership in the chapter write “Yes” on the top of your application and give it to a member at your table – if not, then please take it with you. We appreciate your time today.

\* Members should plan to stay for a few minutes to complete the Test Drive Candidate Evaluation Forms – this will help the whole chapter make a better-informed decision.

# Part 6: Toolkit (Continued)

## SAMPLE - TEST DRIVE CANDIDATE EVALUATION FORM

Your Name: \_\_\_\_\_

Candidate Names	Person 1	Person 2	Person 3	Person 4
Successful business person				
Loves to learn (continual/self-directed)				
Giver/sharer of themselves				
Passion and energy (gives energy)				
Optimistic				
Confidence balanced with humility				

**SE - Strongly evident**

**S - Somewhat evident**

**N - Not Evident**

**? - No opportunity to observe**

Would you want them in your Forum (hypothetically)				
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**Y= Yes, this is the type of person that I believe would be a great Forum member.**

**N = No, I do not think this person will add value to a Forum.**

**NS = Not Sure. I do not have enough information to decide.**

Notes: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

# Part 6: Toolkit (Continued)

## 6.4 MEMORANDUM OF UNDERSTANDING

A Memorandum of Understanding (MOU or MoU) is a formal agreement between two or more parties. Companies and organizations can use MOUs to establish official partnerships. MOUs are not legally binding but they carry a degree of seriousness and mutual respect, stronger than a gentlemen's agreement.

### What does the MOU seek to address?

EO chapters that are interested in establishing a second chapter in their market can use the MOU to help foster collaboration between mature and startup chapters by setting clear expectations and establishing open lines of communication.

### What are some common challenges?

1. Money distribution
  - a. Funding for recruitment and learning events
  - b. Loss of dues revenue due to member transfers
2. Finding a champion and building a team
3. Commitment from the current local Board to support the startup beyond the launch
  - a. The first Board is loving it, but when the next Board comes in, they are the ones hit with the loss of members, the added expenses at learning events and, if they lack vision, they will see the seed as competition instead of a potential great partner in growth and member benefits.

### MOU benefits:

1. Clear expectations
  - a. Both parties determine the terms of the MOU and can come to an agreement on how to proceed with establishing a new healthy and vibrant chapter in their market
2. Security
  - a. A standard set of guidelines, built from the lessons learned by previously launched second-chapter cities, can provide member-leaders with the freedom to be creative while undertaking this effort. The MOU provides the structure that both chapters will need and want in order to move forward.

### Advantage of seeding a startup chapter:

3. Increase member value
  - a. MOU facilitates being able to build the Brand, more chapters, more members and a more deeply rooted EO community

# Part 6: Toolkit (Continued)

- b. Members that might have left because they were tired of traveling long distances for events can now stay engaged
- c. Ability to attract greater sponsor dollars and strategic partners
- d. New people means new experiences, new ideas, new opportunities and generates excitement both internally and externally for EO members

## **Mike Bacile describes the No. 1 benefit of seeding a second chapter:**

I think joint- chapter events are the biggest benefit to seeding a startup chapter. A chapter of 80 people is a great size for funding events and still being connected. At 100 to 120 members, however, people start to complain that there is a loss of intimacy, but with more numbers you can put on bigger (and hopefully better) events. Through seeding, you can establish two closely bonded chapters of 80 members and throw great events with the 160-member budget one, two or even three times a year. Houston's idea of having a total of five chapters will allow them to put on Universities for the Houston area without it affecting the budget."

## **SAMPLE MOU**

This is a draft document that outlines the co-existence of two chapters in Toronto.

### **Working Agreement**

#### **Overall**

- Name of new chapter and/or any modification to existing chapter?
  - The name of the existing chapter will not change.
  - The name of the new chapter is proposed to be EO Toronto West.
- Determine what distinguishes the two chapters.
  - The chapters will be differentiated by geography.
  - The existing chapter will actively recruit in Toronto East.
  - Toronto West will recruit in Toronto West, to include Oakville West and the Niagara Peninsula.
  - While the chapters have set areas, these are to be used as guidelines and not mandated. Ultimately it is the prospective member who should determine which chapter suits them best.

# Part 6: Toolkit (Continued)

## Board Involvement

- Confirm seats on each other's Boards and identify those specific individuals. Frequency?
  - Both parties agree that quarterly would be mandatory though the option is there to attend every month if they so desire.
  - This would be a "non-voting" Board position on the other chapter's Board.

## Membership (Recruitment)

- Determine how the chapter will handle recruitment. Joint events? Independent events?
  - Each chapter will run their own recruitment efforts, though some events may be a good opportunity to work together.
  - If a prospective member is applying in the other chapter's "Area," both chapters agree to inform the other chapter.
- Will existing members be able to join? If the dividing line is geographical, are there certain members who would join the new chapter now? Is that okay? Transfer fee to existing chapter? (One year or ongoing?)
  - Both parties agree that a significant drop in the existing chapter's membership is not healthy.
  - Both parties agree that the new chapter should be formed with two Forums consisting of 16 members total. This can come from the At-Large group in Toronto, the existing chapter or new prospective members initially. Beyond the 16 to start the new chapter, both parties agree that there will be a transfer fee initiated to deter more members from joining the new chapter.
  - A \$500 transfer fee will be imposed on transferring members beyond the first 16 and be given to the existing chapter as a way of compensating their loss in budget in the first year.
- What happens if one chapter turns down a prospective member? (What is the communication to the prospect and to the other chapter? What is the action of the other chapter?)
  - Active communication between the Membership Chairs and the Chapter Administrator is essential. Both chapters agree to communicate on an ongoing basis.
- How do the chapters wish to handle Global involvement in aiding in recruitment events? What happens when a prospective member contacts Global? Which chapter should the referral go to?
  - Global will help each chapter based on its geographical area with joint events a possibility. Global will allocate referrals based on postal code. Should prospective members live in one postal code and work in another, they will be informed about both chapters in the area though referred to the chapters on an alternating basis.
- Go over the list of members who have departed the Toronto chapter to identify individuals whom we may want to target to join the new chapter.

## Part 6: Toolkit (Continued)

- Both parties agree that there are some individuals that it would be better not to approach.
- Both parties agree to research the lists and meet again to review.
- With the provisional chapter, the new chapter must achieve 25 members in 12 months. Beyond 12 months what is the long-term goal for the new chapter? 100 members in five years?
  - This will be built-out in the three-year plan for the chapter.
- What is the communication by each chapter when a member is asked to leave their chapter, no longer qualifies, etc.?
  - Again, active and open communication between chapters is essential and both agree.
- Can members belong to more than one Forum? Where will the dues go?
  - If members want to be in a Forum in each chapter then they must pay both chapters' dues.
- Can they belong to one chapter Forum and attend events in the other?
  - They can if they choose, though they will need to pay dues in both chapters or chapter dues to the chapter where they have their Forum and user fees for the events of the second chapter.
- Share Forum Training? Forum Moderator Training?
  - Yes. Currently EO Toronto has Forum training bi-annually. Based on demand from both chapters the schedule may be increased to quarterly. At least initially, Forum training will need to be scheduled for the new members of Toronto West.

### Sponsorship

- Will the chapters work on sponsorship collectively?
  - Yes, but not solely.
  - An appropriate allocation will need to be agreed upon by both parties in this area though the number of members seems to be the leading thought between the parties.
- Is there any sponsor that would want to sponsor the new chapter now? Can we approach existing sponsors to increase their level of sponsorship?
  - Yes, both agree that this would be an easy win. Both agree to put this on the project timeline for the new chapter launch.
- Are certain sponsors off-limits?
  - This may be determined when the sponsors are approached. The key objective here is not to do anything at the expense of the existing chapter.

# Part 6: Toolkit (Continued)

- In addition, open communication between chapters on who is sponsoring each will reduce any confusion.

## Finance

- What are the dues for the new chapter? Initiation fee?
  - It is agreed that the dues in the first year should be the same, or not more than a \$200 deviation. Initiation fee can be the same.
- It is suggested that a portion of the dues go back to the existing chapter for the members of the new chapter to attend all chapter events and to offset the expense of a part-time administrator.
  - To keep things clean it is agreed not to mix budgets, but rather to pay for services rendered.
  - Should Toronto West members wish to attend events in the Toronto chapter, they can do so on a per-user basis.
  - Toronto West will pay for services of the Chapter Administrator out of their line-item budget.
  - Both chapters agree to set a reasonable per-user fee for events.

## Chapter Administrators

- Will the existing Chapter Administrator be able to support the new chapter? The additional chapter dues paid to the existing chapter would cover this amount. What is the understanding here? What is the time commitment for each chapter? 75/25?
  - Toronto West will pay a per-member fee to the Toronto Chapter Administrator for her services. It is recommended that the per-member fee be \$200.
  - Toronto West is looking at this as a short-term solution until 31 December with the option to extend an additional six months into 2009. The compensation for the first six months is to be guaranteed at 20 members x \$200 = \$4,000.
  - Both chapters may determine individual or combined needs in the future.

## Learning

- Each chapter agrees to post each other's events on their published calendar.
  - Agreed
- Both chapters members would pay a reasonable amount as a user to pay for each other's chapter events. Both chapters may have one or two exclusive events per year.
  - Agreed
- The chapters agree to have a minimum of two mutual events each year together. What months should

# Part 6: Toolkit (Continued)

those be in and who is hosting which? What is the agreed upon percentage of contribution from each chapter? It is recommended to be the percentage of members.

- Each would host one and maybe the holiday party can be combined.
- The budget would be based on a per-person allocation based on chapter size.

## Accelerator

- What is the impact on the existing Accelerator program? If a participant joins the new EO chapter would there be a fee paid back to the existing chapter as they have been bearing the cost of the program?
  - No need.

## Staff Support and Budget for New Chapter

- Both chapters can expect proactive support from staff. Laura Booker is the Chapter Manager for each of the chapters. In addition to Laura, EO Global provides a Staff Task Force to work with each respective chapter officer in the new chapter.
  - Okay
- \$7,500 in support will be given to the new chapter. This is not intended to pay 100% of all associated expenses but rather to act as a starter for the chapter as follows: \$2,500 to cover an EO strategy summit, \$1,000 for recruitment, \$1,000 for chapter admin expenses, \$1,000 for the President and President-Elect to attend the Presidents' Meeting, \$1,000 for a learning event, \$1,000 for Forum moderator training and/or officers to attend GLC.
  - Okay

## Communication

- What is the message to the existing chapter members regarding the new chapter? To each other's Boards?
  - A communication will go out from Todd Mendenhall (the Global Board member involved in this project). It will outline the opportunity for a select few to "make their mark" by launching a new chapter in EO.
  - The communication will address the positive points regarding this venture to include what is in it for the member:
    - Increased local access and peer network
    - Sustained intimacy as the chapter size is kept at a reasonable number
    - New experience share and broadening of knowledge and learning
    - Beyond local experience brought to you locally. i.e., University and Regional conference experience



# Part 6: Toolkit (Continued)

- Sharing newsletters?
  - Maybe in the future. For now, sending each chapter the other chapter's newsletter would be appropriate.
- Joint PR efforts?
  - Can discuss further
- Website content?
  - Can discuss further

## Milestones, Dates, Owners

- Mark to get approval from his Board by 30 July.
- Mark to select a chapter member to be the liaison to the EO Toronto West Chapter. This will be an additional Board position.
- Todd to send letter to the Toronto chapter and At-Large members in Toronto explaining the initiative (Brian C. to write). Letter to be sent after Mark has confirmed his Board is in support of this initiative.
- Laura Booker to work with Brian H. on a chapter launch timeline.
- Brian Hansell to complete chapter launch application after he determines the founding Board members.
- Once the chapter launch application has been completed and approved, EO Global to create EO Toronto West in the database.
- New chapter pre-launch in late September. Michael Gerber in October.
- Go over the list of members who have departed the Toronto Chapter to identify individuals whom we may want to target to join the new chapter.
- The Chapter President is a key, senior-level strategic resource for a chapter. He or she is essential in driving its success. Prior to approving the launch of a second chapter in a city, certain criteria have to have been met and the health of the existing chapter evaluated.

## Goals

- To create a cohesive relationship with the new chapter in the same city.
- Maintain the strength and health of the existing chapter by maintaining intimacy, as well as increasing the network and opportunities for entrepreneurs within the geographical area.

## Process

- Once the below criteria are met and the application and commitment sheets are submitted, the Global Membership Development Committee will evaluate and determine the next steps.

# Part 6: Toolkit (Continued)

## Criteria to consider launch of a second chapter in a geographic area

- Must have 100+ members and a renewal rate of at least 85 percent.
- Three of the founding members are required to be from the existing chapter. One must be a past president of the chapter. The other two members must have at least two years of Board experience each. Ideally, one of them would have been a Learning Chair.
- Current Board members cannot be poached from the existing chapter. Board members currently serving on the existing chapter Board are not eligible for membership in the new chapter until their Board term expires.
- Each of the three founding Board members from the parent chapter must be trained as Forum Moderators. Each will be responsible for seeding each new Forum and serving as the founding Forum Moderator.
- All founding Board members must be signed up for Global auto-renewals.
- Existing chapter must agree to do two annual events to be combined with new chapter.
- Free up 25 percent of your Chapter Administrator's time to work with the new chapter. (Your chapter would be receiving 25 percent of each member's dues from the new chapter for the first 12 months to cover this cost and the events cost.)
- Post new chapter events on existing chapter's Learning Calendar and invite the new members to your events. (Your chapter would be receiving 25 percent of each member's dues from the new chapter for the first 12 months to cover this cost and the Chapter Administrator's cost.)
- Establish a user-pay model for local events for the new chapter members after the first 12 months.
- Designate a Board member to be the Chapter Liaison between the two chapters.
- Chapter Liaison to attend new chapter Board meetings quarterly.
- Upon receipt of the application, the member-led Global Membership Development Committee will evaluate chapter health and determine the viability of launching another chapter in this market.
- Agree with the new chapter on how the geography or other differentiating characteristic is to be defined.
- Agree with the new chapter on the name of the new chapter.
- Agree to share Forum Training and Moderator Training.

I, \_\_\_\_\_, understand and commit to the terms and conditions of this document.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

# Part 6: Toolkit (Continued)

## 6.5 CHAPTER LAUNCH APPLICATION

### CHAPTER LAUNCH APPLICATION

FY2017/2018

Chapter Name \_\_\_\_\_ Local Currency \_\_\_\_\_

**Chapter Mailing Address**

Address: \_\_\_\_\_ Phone \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Fax \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Full Name of Chapter Champion \_\_\_\_\_

**Founding Board**

Officer Position	Member Name	Joined (Y/N)
President		
Forum Chair		
Membership Chair		
Communications Chair		
Education Chair		
Integration		
Finance/Governance		
Finance/Sponsorship		

New Member Dues: EO's Fiscal Year is July 1 - June 30. Dues are pro-rated on a monthly basis and include a one-time initiation fee. Please indicate your local dues amount and specify if it is in USD or your home currency. Also indicate if you wish to have an initiation fee for your local chapter.

Chapter Dues	Chapter Initiation Fee	EO Dues	EO Initiation Fee	Total
		US\$1900	US\$2200	

**Agreement**

Thank you for your interest in the Entrepreneurs' Organization (EO). The dedication of the champion often determines the success of a chapter launch. EO Global Membership Support Services Department (GMSSD) will aid you in any way necessary including but not limited to finding potential members, arranging learning events, developing Forum groups, accessing Global benefits and the overall training of your members and officers. As the champion, you will be responsible, along with EO, to ensure that the growth and development of this chapter is maintained for the duration of 18 months; after which, an operational system should be set in place. Your signature on this document in no way financially binds you to the success or failure of this chapter. By signing this application, you are verifying that all of the information you are providing is accurate to the best of your knowledge. We appreciate your determination and look forward to working with you in the future.

x \_\_\_\_\_

For Internal Use		Date	
CDC Approval		SVP Approval	
Chapter Launch Director		Global MDD	

# Part 6: Toolkit (Continued)

## 6.6 CHAPTER LAUNCH AGREEMENT FORM

### AUTHORIZED CHAPTER AGREEMENT

The Entrepreneurs' Organization, Inc. ("EO") is a not-for-profit organization created under the laws of the District of Columbia, USA, for qualified entrepreneurs from around the world. Pursuant to its Bylaws, EO authorized the establishment of the \_\_\_\_\_ Chapter ("Chapter") to serve a group of EO members who meet on a regular basis. By associating with EO, the Chapter can give EO's membership the opportunity to participate in, and benefit from, the myriad of programs, products, services and activities that EO provides for all of its authorized chapters and its members who join authorized chapters. This dynamic partnership enables a global network of industry experts and leaders of business to freely share ideas and experiences in a safe environment, providing the opportunity for the members to become better entrepreneurs through business, professional, and personal growth and development.

The success of the partnership between EO and its authorized chapters depends on a clear understanding of the rights, responsibilities and obligations of both EO and its authorized chapters. Therefore, EO and the Chapter have agreed to enter into this Authorized Chapter Agreement ("Agreement") to detail the terms and conditions of the relationship between them.

THEREFORE, EO and the Chapter agree as follows:

#### **Terms of Agreement:**

1. This Agreement is intended to provide guidance and protection regarding the rights and responsibilities of EO and the Chapter. EO grants the Chapter the authority to organize and operate as a Chapter of EO, and the Chapter agrees to operate in a manner consistent with the requirements established by EO. This Agreement shall become effective and commence on the date EO and the Chapter execute this Agreement, and it shall remain in effect as long as the Chapter remains in compliance with its terms and conditions, unless sooner terminated pursuant to the provisions of this Agreement.
2. The Chapter agrees to subscribe to EO's vision, mission and values, and agrees to accept as binding the provisions of EO's Bylaws, EO's Code of Conduct and EO's Policies and Procedures. A copy of the Bylaws currently in effect is attached as Appendix A. (Other documents are on the EO Network, or EO will provide copies upon request.)
3. As long as this Agreement remains in effect, the Chapter shall use the name "Entrepreneurs' Organization," "EO," and all of EO's related marks and brand, as a part of its Chapter name and identity. EO authorizes the use of its name, mark and brand consistent with its "License Agreement" to use Entrepreneurs' Organization Marks policy, the terms of which EO and the Chapter specifically incorporate herein to this Agreement as valid and binding terms upon the Chapter. A copy of the "License Agreement" to Use Entrepreneurs' Organization Marks policy is attached as Appendix B.
4. Both EO and the Chapter agree to submit only written modifications of, or amendments to, this Agreement signed by an authorized EO Global Officer and the Chapter President.

## Part 6: Toolkit (Continued)

### Chapter Requirements:

In order to preserve a healthy, vigorous Chapter, and thereby ensure a valuable experience for all EO members, the Chapter shall meet and satisfy EO's policy, titled "Minimum Standards and Chapter Formation and Good Standing;" a copy of each is attached as Appendix C. Additionally, EO expects the following operational requirements from the Chapter:

1. The Chapter shall ensure that every member of the Chapter has paid their EO dues and submit those dues to EO by 1 July each year.
2. The Chapter shall submit EO membership dues and renewal information through EOaccess or directly to EO, and shall make progress and financial reports to EO on an annual basis or when requested.
3. The Chapter shall obtain and maintain any insurance required by any governmental authority and/or when necessary and prudent for the Chapter's operation.
4. The Chapter must comply with all laws and regulations in the Chapter's respective countries and jurisdictions, which includes laws and regulations pertaining to a tax exempt organization.
5. The Chapter agrees not to conduct, endorse, offer, promote, develop or support any program, meeting, convention or educational event which conflicts with any EO activity or policy without the express written consent of EO.
6. The Chapter is a separate legal entity from EO, and may describe itself as an "affiliate" of EO. However, the Chapter's officers, agents or employees may not hold themselves out as agents of EO. The Chapter shall not contract in the name of EO, or incur any financial or other obligations of behalf of EO, without the express written consent of the EO Chairperson or the EO Executive Director. [EO does not own, in whole or in part, the Chapter.]

### Chapter Privileges:

1. As an authorized chapter of EO, the Chapter is entitled to offer all of the EO products, services, programs and activities to the Chapter's EO members and officers. A copy of EO products, services, programs and activities is attached as Appendix D.
2. EO has authorized the Chapter to develop, manage and maintain the Chapter within a specific location and with a listing on EO Network as an EO chapter. This privilege does not create an exclusive territory for the Chapter, and EO reserves the right to authorize other chapters in the same location or region (as EO deems necessary and appropriate) to advance its vision, mission and purpose.
3. The Chapter shall be eligible for direct financial-incentive payments from EO to chapters in accordance with financial incentive programs EO may establish and maintain from time to time.

# Part 6: Toolkit (Continued)

## **Termination:**

1. This Agreement renews automatically on an annual basis until terminated by either EO or the Chapter by providing 60 days' written notice. Upon termination of this Agreement for any reason whatsoever, the Chapter hereby agrees that it will immediately cease the use of the name "Entrepreneurs' Organization," "EO," or any variation thereof, and all of EO's related marks and brand. Further, the Chapter shall immediately dissolve its organized status pursuant to the applicable laws where the Chapter operates and liquidate all of its assets. If the Chapter fails to take these actions within a 10-day period following the termination of this Agreement, then the Chapter acknowledges and agrees that EO shall be entitled to pursue immediate injunctive relief and any other available legal or equitable remedies to prevent the Chapter from continuing its operations or existence and to prevent the Chapter from using EO's name, marks or brand.
2. Upon dissolution and final liquidation of the Chapter, the Chapter's officers shall distribute the Chapter's remaining net assets to the EO members of the Chapter consistent with applicable laws. To the extent any assets remain after distribution to EO members, EO shall retain all remaining assets for use consistent with its tax-exempt purpose and for the benefit of EO members and other authorized chapters. Under no circumstances shall any assets inure to the benefit of any one individual member or person unless required by law.
3. Termination does not relieve EO or the Chapter of any obligation to pay any amounts due and payable to the other on the date of termination.

## **Miscellaneous**

1. If any court or judicial entity declares any portion of this Agreement invalid or unenforceable for any reason, then EO and the Chapter agree that the decision shall not affect the remainder of the Agreement, which shall remain in full force and effect.
2. Waivers to any provision of this Agreement are invalid unless contained in a written notice given by either EO or the Chapter granting the waiver. A waiver or failure to enforce any provision in this Agreement shall not serve as a waiver of any other, or further obligation, or liability of either EO or the Chapter.
3. The laws of the District of Columbia in the United States of America shall govern this Agreement, its enforcement, the construction of its terms, and the interpretation of the rights and duties of EO and the Chapter.
4. This Agreement may be executed in any number of counterparts, each of which is deemed to be an original, but all of which together constitute one and the same instrument.
5. This Agreement is not intended to confer any rights or remedies hereunder upon, and shall not be enforceable by any person other than the parties named hereto.
6. The Chapter cannot assign this Agreement whether by operation of law or otherwise without the written consent of EO.

[THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK]

# Part 6: Toolkit (Continued)

## Entire Agreement:

This Agreement, dated \_\_\_\_\_, constitutes the entire understanding and agreement between EO and the Chapter with respect to the subject matter hereof, and supersedes any and all prior or contemporaneous oral or written understandings or agreements. The undersigned agree to abide by the terms of this Agreement and the attached appendices, which are considered a part of this Agreement. This Agreement is effective on the date of its acceptance and signature by representatives of EO and the Chapter.

## ENTREPRENEURS' ORGANIZATION, INC.

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

EO \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_ Chapter President \_\_\_\_\_.

Date: \_\_\_\_\_, 2015 \_\_\_\_\_.

# Part 6: Toolkit (Continued)

## 6.7 NEW CHAPTER SUMMIT FACT SHEET

An EO New Chapter Summit provides officer training to newly established chapter boards. It gives the brand new Board an understanding of their roles, duties and commitments and helps them develop a strategic vision and direction for their new chapter. New Chapter Training is a critical first step in laying the foundation for a thriving EO chapter.

### **How much does a New Chapter Summit cost?**

Once a new chapter launches, the region receives US\$15,000 to be used for continued recruitment support and to help educate the chapter. The cost of a New Chapter Summit is US\$3,000 which covers the facilitator fee, travel and expenses, as well as expenses incurred by the support staff. EO Strategy Summits offer a US\$1,500 subsidy to chapters in their first two years of operation. The remaining balance can be covered from the launch grant funds or from the Global Growth Task Team (GGTT), depending on the location of the chapter.

In addition, the chapter may submit for reimbursement any venue, food and beverage, or other costs associated with the New Chapter Summit if the region has agreed to cover these costs. It is recommended that the New Chapter Summit take place in a local member's board room in order to minimize costs.

### **When should the New Chapter Summit take place?**

The New Chapter Summit should take place after the chapter has officially launched with 16 new members and has a selected Board of six to eight officers (President, Forum, Membership, Learning, Finance and Communications are required positions; a paid Chapter Administrator is strongly suggested). When selecting a date for the New Chapter Summit, ensure that there is 100% participation from the local Board members. The booking process can begin once the launch is approaching 12 or more members. Allow 45-60 days lead time to secure a facilitator.

### **Why is the New Chapter Summit positioned within EO Strategy Summits?**

EO Strategy Summit facilitators undergo extensive training, and are tenured members who have all served on their local Boards, Regional Councils or Global Board. Because of their EO leadership experience, they have been selected to facilitate New Chapter Summits. Moreover, a chapter launch occurs under the auspices of the Global Membership Development Committee. This committee's main objective is to ensure the health of all EO chapters. The EO Strategy Summit program and the New Chapter Summit are two products specifically designed to train and support EO chapter officers.

### **What can a new chapter officer expect from the New Chapter Summit?**

The New Chapter Summit is designed as an eight-hour session. The facilitator will guide the new chapter Board through a list of roles and responsibilities as well as an exercise to start the local officers thinking strategically for the future and to create action steps for the next 90 days.

The New Chapter Summit does not require a pre-program Board dinner, however, we recommend these optional program enhancements:



# Part 6: Toolkit (Continued)

- Option 1:
  - Day 1: Test Drive or recruitment event
  - Day 2: New Chapter Summit
- Option 2:
  - Day 1: New Chapter Summit
  - Day 2: Forum Training Program (FTP)
- Option 3: Commitment of three days:
  - Day 1: Test Drive
  - Day 2: New Chapter Summit
  - Day 3: FTP

## **How do I book a New Chapter Summit?**

You can request a New Chapter Summit through Margaret Black at [mblack@eonetwork.org](mailto:mblack@eonetwork.org). She will be the primary lead on finding an available facilitator as well as sending the contract and pre-meeting preparation documents to the chapter.

## **What training will facilitators have?**

The Strategy Summit team will train all facilitators on how to deliver a New Chapter Summit. In the interim, we will continue with one-on-one calls between the facilitator and staff.

## **What is the Chapter Manager or Staff Director’s responsibility?**

After the contract has been sent and received, the Chapter Manager or Staff Director is responsible for keeping up with the chapter to arrange logistics and collect hotel recommendations. The Chapter Manager or Staff Director is responsible for making sure that all “day of” logistics are in place (confirming with the chapter President) a week in advance. The Chapter Manager or Staff Director is also responsible for ensuring that the facilitator has booked their flight and hotel room. If it is easiest to arrange hotel for both staff and facilitator, staff should book accordingly.

## **Meeting logistics for Forum Training**

1. Time – eight hours (standard is 7:30 a.m.–4:30 p.m.)
2. Location – EO typically books, this session requires a private room with a closed door
3. Estimated Headcount–Provide a list of attendees at least one (1) week prior to the training. This information is critical because it ensures that the venue is set to accommodate the numbers and also that the trainer is aptly prepared.

# Part 6: Toolkit (Continued)

4. Name of someone to receive the shipped materials

## Select a Venue

1. Factors in selecting a venue

- Chapter preference
- What has been used in the past
- Cost

2. Chapters coordinating their own venues

- Chapters can choose to book their own venues for any of the following reasons:
  - Language/cultural barriers – typical of chapters outside of North America
  - Personal connection with a venue and preference to handle it on their own
  - Private venue with limited access
  - Chapter Administrator prefers to conduct setup instead

If chapters book their own venue the process is as follows:

Chapter Responsibilities	Forum Training Manager Responsibilities
Send venue name and address to staff →	Post event with venue information to EOaccess
Arrange catering and AV with venue per EO standard specifications	←Send list of venue requirements to the Chapter
Request for direct billing in advance if desired →	Arrange direct billing with venue if applicable
Submit expense reimbursement form and receipts after the training	←Send expense reimbursement form if needed and submit to accounting once received

## Meeting logistics for the recruitment event

1. Determine event type

- a. Keynote speaker
- b. In the board room, hosted at the speaker’s business
- c. Breakfast with a CEO or influential local business leader
- d. Lessons from the Edge

# Part 6: Toolkit (Continued)

## 2. Guidelines

- a. The company has failed and the owner built a successful company(ies).
- b. The company is on the brink of closing but is saved.
- c. Options can include members of EO or YPO as long as they fit the above criteria.

## 3. Logistics and Cost

- a. Start the planning process three to four months in advance.
- b. Room rental and audio visual costs will vary by venue.
- c. Meeting in a board room is at no cost since it is hosted by the speaker.

## 4. Process

- a. Select a venue for the discussion.
- b. Select the CEO and prepare a few alternative speaker suggestions.
- c. Once the CEO has confirmed, send out the invitation with a deadline for registration.
- d. Include the CEO's bio and company bio in the invitation and market the valuable nature of the event.
- e. Get logistical details from the company regarding any audio visual or handouts that the CEO will utilize.
- f. After receiving all of the registrations, a week prior to the event, send the CEO an information sheet with the number of attendees and demographics of the group.

### **Meeting logistics for the Test Drive event**

1. Time – two hours
2. Location – this session requires a private room with a closed door
  - a. Typically a venue that serves food and beverages is preferred
  - b. Audio visual set-up
  - c. Flipchart with markers
  - d. Round tables to accommodate eight to ten people

# Part 6: Toolkit (Continued)

3. Estimated Headcount – Provide a list of attendees at least three (3) weeks prior. This information is critical because it ensures that the venue is set to accommodate the correct number of attendees.
  - a. For each round table there needs to be an experienced EO member to facilitate the conversation / Test Drive. Example: for 40 attendees there must be four EO leaders, one for each table.
4. Name of someone to receive shipped materials.

## **Is there a Powerpoint and if so, who updates it?**

Yes. The program manager updates it with the assistance of the coordinator and Strategy Summit Director.

## **Is there homework for the chapter before their workshop?**

It is recommended that the chapter officers log on to EOnetwork.org to access their officer guides before the workshop.

## **Are there workbooks for the New Chapter Summit?**

Yes. Workbooks and other tools will be distributed during the New Chapter Summit. Post-meeting, the officers can expect to have the following items:

- A measurable accountability plan with action steps for the next 30/60/90 days
- A budget template
- A Learning Calendar template
- A bylaws template
- A Forum constitution template
- The chapter formation and good standings checklist
- A roadmap to reach 25 members within two renewal cycles

# Part 6: Toolkit (Continued)

## 6.8 REGIONAL LAUNCH GRANT INFORMATION

EO fiscal year 2017/2018

### **Initiative**

The Regional Launch Grant is designed to give greater autonomy to our regions in the development of their member base and community with the consideration of chapter and area priorities. Regional Directors working with their council members and professional staff should submit their requests to the Global Membership Development Committee Chair via Laura Johnson at [ljohnson@eonetwork.org](mailto:ljohnson@eonetwork.org).

### **Step 1: Submit for US\$7,500 + Region earmarks US\$7,500**

Regional Directors can submit for the grant in either one of two ways:

1. As one of the top five goals for the region with key strategies, metrics and action items to support the goal
2. Apply for the grant by submitting a complete grant application provided herein

This provides US\$15,000 to use up-front for launch activity and flexibility to fund multiple launch locations within the region.

### **Uses and disbursements**

Supplements cost for event attendance, be it neighboring chapter, Regional Event or University

Defray costs of Regional Council member travel to local recruitment event

Local recruitment event costs

Champion to attend Regional Presidents' Meeting

GLC registration fee

### **Step 2: Region to Receive US\$15,000**

Each new chapter of 16 new-to-EO members, including fully paid Global dues and initiation fee, will net the region US\$15,000 for the Regional Director to use for the benefit of growth and development in their region with the guidance of their Regional Council and the Global Membership Development Committee Chair.

### **US\$15,000 - Uses and disbursements**

New Chapter Summit for newly formed Board

Recruitment event to help newly formed chapter reach 25 new members

Moderator training

Administrative support for new chapter

Defray the cost of the new members' attendance at the regional conference

# Part 6: Toolkit (Continued)

For Multi-Chapter: defray the loss of dues revenue to parent chapter

Launch another chapter

Reimbursement of money used from the regional discretionary budget

GLC Attendance, such as travel stipends for travel and lodging

## **BONUS! US\$5,000**

Each chapter that reaches 25 new dues-paying members within six months of launching or at launch will receive a bonus of US\$5,000 paid directly to the local chapter. For Multi-Chapter, the transferring members or retuning e-lumni are not counted as new. Only members who are brand new to the organization will be counted toward the bonus payout.

## **Additional or Unused Funds**

Remaining or unused funds are to be reserved for the discretion of the Global Membership Development Committee Chair or designated subcommittee leader to use for unforeseen chapter launch needs and support. This includes travel, training, program development tools or resources.

<b>Grant Request Application</b>	
<b>Regional Goal the Grant Will Accomplish:</b>	
<b>How the Grant Will be Used to Accomplish the Regional Goals</b>	
<b>Metrics for Progress:</b>	
<b>Global Staff Support Required:</b>	
<b>Member-Leader Support Required:</b>	
<b>Vendors Required:</b>	
<b>Matching Funds from Partners:</b>	
<b>Matching Funds from Region:</b>	
<b>Supported By (list other member-leaders in favor):</b>	
<b>Timeframe for Completion:</b>	

# Part 6: Toolkit (Continued)

## **Limitations**

This program is limited to new chapter launch activity and cannot be combined with any other funding programs.

The following in-progress launches are not eligible to participate:

- Chapter launches being funded by the Global Growth Task Team (GGTT)
- Chapters being funded by the Global Board

# Part 6: Toolkit (Continued)

## 6.9 “SHARE YOUR WISDOM” - FORMER LAUNCH CHAMPIONS

We asked several launch champions from past years to share their experience and comment on the process of launching a new chapter. Below is an experience share from Azra Kertmelioglu, EO Turkey.

### EO Turkey

The EO Turkey chapter has been in place since August 2012. Over the last 3 years it has grown to 33 members. We spoke to [Azra Kertmelioglu](#) who was crucial to the new chapter's success.



[Azra Kertmelioglu](#)

#### What made you want to do it? What was the benefit you were looking to gain by bringing an EO chapter to Turkey?

**AK:** “Frankly speaking I took over from [Ferda](#) (my brother) who had championed the chapter but had an engagement due to which he couldn't attend the first ever meeting necessary. At the beginning, I wasn't even sure what I was about to get into, but to attend the next global event (GLC Bahrain) to meet everyone and get all the information necessary to do the start up.”

#### When you took that leap of faith to join and start the chapter, what were some

[each](#) other in the sense of responsibility and worked day & night to form the pillars of the organization.”

#### Emotionally, how did you connect with people and inspire them to join?

**AK:** “Having started my first experience with a global event has made me really feel what it feels like to be an [EO'er](#). No unseen masks, no pretend talks, everyone from around the world welcomed me with open arms even though there was no chapter yet. This was the feeling that I always tried to pass on to the prospects for the coming 2 years.”

#### How did you overcome the objection of “there is no chapter so I'll just wait until we have 16 and then join”?

**AK:** “[Ferda](#) was already an active board member of another reputable businessmen organization in Turkey called TUGIAD (Young Turkish Businessmen Organization) and he had already recruited some of his fellow friends from [Tugiad](#) so even though we weren't 16 yet, we were already 8 and we were all really excited about starting the

*The above is an excerpt.*



# Part 6: Toolkit (Continued)

## 7.0 CHAPTER NAMING

The purpose of establishing guidelines around naming of chapters is to:

1. Create consistency around chapter names worldwide; present a unified “face” to the world of our locations
2. Avoid frequent chapter name changes, which consume time and resources
3. Provide clarity to prospective members on which chapter they should apply to join
4. Clarify where EO chapters are located

To do so, the following guidelines must be used when naming a new chapter, or changing the name of an existing one.

1. If the new chapter is expected to be the only chapter in the country, the chapter name will be “EO [Country].” So, if only one chapter is expected in Peru, the chapter will be called EO Peru.
2. If more than one chapter is expected to be in the country in less than 10 years, the name will be “EO [City].” So if Peru is expected to have two or three chapters, the first chapter would be named EO Lima.
3. For U.S. states (or countries with similar state-arrangements), the state may be used if there is no likelihood of a second chapter forming in the same state (EO Idaho).

Chapters should not be named based on geographic “areas” or other characteristics. If other considerations exist where the new chapter wishes to be called something outside of these guidelines, the champion/president may discuss it with the Global Membership Development Committee. Final naming authority resides with the Global Membership Development Committee and Global Board.

A number of chapters do not currently follow this format. They will not be required to make a change, but moving forward this new guideline will be in effect.

### Process for Changing Names of Existing Chapters

Requests for name changes must be first approved by the Regional Council, then submitted to the Global Membership Development Committee and approved by the Global Board. The following one-page request form should be used. Name changes must follow the same guidelines as above.

# Part 6: Toolkit (Continued)

## Request to Change EO Chapter Name

Current chapter name:	
Proposed new name:	
Possible alternate name:	
Request submitted by:	

**Please explain why you are requesting this change:**

**Is your local Board in unanimous approval of this change?**

Date submitted by chapter	
Date approved by Regional Council	
Date approved by CDC	
Date approved by Global Board	