CHAPTER FORMATION AND GOOD STANDING CHECKLIST

FY2010/2011

PRESIDENT

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

LEARNING

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

FORUM

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

COMMUNICATIONS

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

FINANCE

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

MEMBERSHIP

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

CHAPTER NAME

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