

**Chapter Leadership
Training**

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**President's
Guide**



**NMA...THE Leadership Development
Organization**

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CHAPTER LEADERSHIP TRAINING

PRESIDENT'S GUIDE

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Where to Begin?

TO THE PRESIDENT

It is important that you view the presidency of your NMA chapter as an executive function rather than the handling of administrative tasks such as those you may have performed in your previous chapter responsibilities. If you allow yourself to become entangled in all the many details of chapter operations, the chapter will, in effect, lose its leader. Besides being poor management, this is grossly unfair to the members, to your chapter leader team, and to you.

Your greatest contribution to progress and dynamic achievement in the NMA chapter will be in LEADING -- the setting of firm objectives and ensuring that, through the actions of other people, these objectives are achieved during your term of office.

In applying the executive "touch" to your responsibilities as president, there should be no question about whether to innovate with new publications, new programs, new meeting styles, and similar new ideas. The question should be only where, when, and how to introduce them. If you can inject this spirit into your leadership team, you will have taken the first step toward success in stimulating old members and attracting new ones into the organization.

Under the current system for Chapter Leader Training, the chapter will conduct its own Chapter Leader Development Program. Details are outlined beginning on the next page. Some additional thoughts, which may be useful to you in your role as chief executive, are provided in other publications appearing in this kit.

The operative word, here, is TRANSITION. You should distribute the training kits to your fellow chapter leaders and urge them to read them soon.

As you review the kits for other officers and key people, you will see several manuals and publications which may be of particular interest to you. If you would like to have an additional copy for your own use, please feel free to order them from NMA headquarters — or download from the NMA website.

After completion of your Five-Step Chapter Leader Training Program, you will have other opportunities for chapter leadership training in the form of chapter operations clinics conducted by your NMA council, and the NMA Leadership Development Conference (LDC) in your region in the spring.

Don't forget about NMA "QuickTools" on NMA's website. These are "short and sweet", two-page chapter leadership aids, aimed at providing short answers to the most common questions and issues. Stay current and get many of your questions resolved simply by logging on to www.nma1.org!

Chapter Leader Training Kit

Your NMA Chapter Leader Training Kit provides the materials and instructions to guide you in conducting your own Chapter Leader Training Program using your own leadership resources.

The Five-Step Program can be conducted entirely by your own current and incoming leaders; and an additional dimension can be achieved if you call upon your NMA Director to sit in on one or more of the meetings in Steps II, IV, and V.

One of the major advantages of the Five-Step Chapter Leader Training Program is that you can fit it neatly into your local conditions. All the timing elements are under your control. If special problems arise requiring staff guidance or help, feel free to call NMA Headquarters.

The Five Steps are provided here, along with a few tips and a timetable for your guidance in adapting them to your chapter's schedule of elections, installations, etc.

Step I D - (DELIVERY) DAY - YOU RECEIVE THE KIT

Please scan the contents of the kit, and then promptly announce a date for the Step II meeting in a few days. This meeting should be attended by all officers-elect and major committee chairmen appointed to date. You may also wish to invite your NMA Director. Don't delay this meeting simply because not all committee appointments have been filled. Prompt action is important here.

Step II D+7 DAYS - AN INTRODUCTORY MEETING OF CHAPTER LEADERS

President distributes the manuals of officers-elect and chairmen. Instructions are given by the officers for Step III actions. A date is set for the Step IV Goal-Setting Meeting in 4 to 5 weeks.

Step III D+8 DAYS - INDIVIDUAL ACTION AND STUDY

Begins immediately following Step II. The officers and chairmen review the contents of their manuals. They prepare tentative goals to be finalized later with other leaders at the Step IV meeting.

Step IV D+38 DAYS - OBJECTIVES AND PLAN OF ACTION

This meeting is attended by all soon-to-be chapter leaders, with you, the President, presiding. Objectives and goals are established and a detailed Plan of Action prepared. Each committee chairman should have a voice in selection of goals and allocation of funds in his/her area of responsibility. At the conclusion of this meeting, each officer should have a clearly defined picture of areas of responsibility, the extent of authority, freedom and limitations of budget, team structures, and deadlines.

Step V D+55 DAYS - TRANSFER OF RESPONSIBILITIES

A meeting conducted jointly by the outgoing and incoming presidents, attended by incoming officers and major committee chairmen and their outgoing counterparts. Its purpose is two-fold: (1) to formally transfer the accounts, property, and other records from the old administrative team to the new, and (2) to informally exchange all pertinent information about regularly recurring chapter events, commitments made, pursuit of NMA Awards, formal and informal policies, and similar items of mutual interest. If, for some reason, it is decided not to conduct a Step V meeting, some of these transfer-of-responsibility actions can be achieved during the Step III period.

The Chapter Leader Training Kit is a regular service of NMA. Each year a new Kit is sent to the new president-elect for distribution to other chapter leaders. During the year, if vacancies in office occur, please try to recover the manuals and reissue them to the successors.

One final remark: NMA welcomes your comments. The Kit and the self-administered Five-Step Plan are only tools. Their success depends upon how effectively you use them. Constructive suggestions from you for their improvement will be most welcome and will receive careful consideration. The checklist below is for your convenience in recording the distribution of the manuals.

Manual Distribution Checklist

Office	Name	Date Issued
Board Chairman (Board Chairman's Guide and Board Member's Guide)		
President (President's Guide)		
Vice President (Vice President's Guide)		
Secretary (Secretary's Guide)		
Treasurer (Treasurer's Guide)		
Awards Chairman (Recognition and Awards Guide)		
Professional Development Chair (Professional Development Resource Guide)		
Membership Chairman (Membership Chairman's Guide and New Member Indoctrination Guide)		
Program Chairman (Programs and Meetings Guide)		
Public Relations. Chairman (Communications, Public Relations, and Publications Guide)		
Community Services (Community Services Guide and Management Week in America Guide))		
Speech Contest Chairman (NMA Leadership Speech Contest Planning Guide)		

"HAVE A GOOD YEAR!"

The Officers and Board of Directors of
NMA... THE Leadership Development Organization

Introduction

The role of the NMA chapter president is, in many ways, comparable to that of an industrial or service organization chief operating executive. Each receives broad objectives and basic policies from the Board of Directors that must be translated into action-related goals for the team. Each delegates operational responsibilities and assigns measurable goals to a team of leaders. Both must be alert to the needs and desires of the public, but cannot allow themselves to be pressured into serving the few at the expense of the many.

The principles of managing apply in both positions. Both spend the greater share of their available time on planning, a lesser share on organizing and motivating, and the least amount on controlling. For the chapter president the rewards of successful achievement are not as great as his/her corporate counterpart, true; but neither are the penalties of failure. Most chapter presidents, upon assuming office, will have had some education and training in chapter operations, and all will have had some experience in service, business, or industrial management. Few will have had experience as top executive of a voluntary organization like an NMA chapter.

In this guide we will help the newly-elected president make the transition from the familiar to the unfamiliar and apply what he/she already knows about the science and art of business and industry to chapter leadership.

Other parallels of the two types of executive positions should be borne in mind by the newly-elected chapter president contemplating an approach to the coming tasks, such as:

- Organization executives do not attempt to solve frontline daily production problems. Comparably, chapter presidents should not make decisions on such details as the menu or floral decoration for the membership meetings.
- Organization executives must give attention to selection and placement of operating executives, to ensure they are placed in the position where they can make the greatest contribution to the organization. Chapter presidents bear the same responsibilities and usually have fewer incentives to offer to potential candidates.
- Organization executives must place and promote junior executives progressively in a continuing effort to develop the people who will eventually hold top positions. The chapter president must plan for the same results, but holds less direct influence over future events than his/her organization counterpart.

IT'S AN OPPORTUNITY

The presidency of the NMA chapter can be an effective leadership simulator, providing experience in goal setting, delegation, and team building. The successful meeting of these challenges at the chapter level may well prove to be useful preparation for handling similar responsibilities later at higher levels in the organization.

BUILDING THE TEAM

One of the major tasks of the chapter executive is the recruitment of the best people available for leadership positions. Predictably, these are busy people who are reluctant to commit further amounts of their time to what they may consider new and strange tasks. The point to make in forming and developing your team is that the tasks are not as strange as they appear. The same basic principles apply to the management of the NMA chapter as in the direction of business, government, and any major enterprise. A department head or executive in industry who has been successful in solving problems will soon realize that planning, organizing, motivating, and controlling are as relevant in guiding the chapter as in the handling of other business responsibilities. In this guide, NMA provides assistance to the NMA chapter executive in making this transition.

THE TYPICAL ORGANIZATION

Among NMA chapters today there are two basic styles of organization structure. The traditional style follows a pattern where all officers—president, vice president, secretary, and treasurer—are elected by popular vote of the members. There is a board of directors consisting of the four officers and an approximately equal number of directors who are either elected by popular vote or appointed by the president.

The president usually presides over meetings of the board. The board generally conducts all chapter business, making little or no distinction between policy-making and administration.

THE CORPORATE STRUCTURE

In recent years another style has evolved. Some chapters, particularly the larger ones, have separated policy making from administration and created separate bodies to handle these two functions. The board of directors makes policy, including broad financial policies, and sets immediate objectives and long-range objectives. Board members are elected by vote of the members, and a board chairman is elected from within the board.

The president is a board member, but other officers frequently are not. This type of structure leaves the officers free to concentrate their attention on handling administrative affairs under the direction of the president. In both types of organizations the administrative officers are usually elected by vote of the members; however, there is a growing trend, particularly in the large chapters, toward another variation of the second style, called the corporate structure, where only the directors are elected by vote of the membership, and the board appoints the president. The president is then given full authority to select his/her own team of officers and managers. Later in this guide there is reference to another new concept, the President's Cabinet. This is not another form of structure but merely another way of viewing the president's close circle of advisors and achievers. It is presented here as a concept and is not to be considered as a part of any formal organization structure.

"FOLLOW ME"

On these pages, while no effort is made to recommend use of any specific organizational style, or the adoption of such terms as the "president's cabinet," the role of the president will be considered to be primarily that of a manager, team leader, and administrator rather than policy-maker. It is at that point where this guide begins.

Planning

The presidency of the NMA chapter is an executive function of the highest order. It demands the exercise of consummate skill by the president to continue to challenge and motivate a group of sometimes casually chosen leaders to devote their free time to this strange and often highly demanding effort. And to make it more difficult, the entire task must be accomplished with volunteers over whom there is no direct authority—all in one year.

STEP I

GET THE FACTS

Where to begin—and when? The wheels of progress should begin to turn the very moment your name is announced on election night. Your plans must be complete and rolling well in advance of your inaugural on installation night, when you will be asked to swear to uphold the constitution of your chapter and of the NMA. Examine carefully the constitutional statements of purpose. These, plus specific objectives and goals from the board, form the background for your plans. If the statement of purposes in your constitution is unclear, or out of step in these times, bring it to the attention of the board for revision or updating.

SEARCH THE ARCHIVES

Another section of the constitution and bylaws which merits close study is the part that lists your responsibilities, outlines your authority, and explains policies and procedures with which you and your team must deal during your term of office.

REVIEW LAST YEAR

Ask the current president to meet with you for an informal discussion of this year's activities. You are probably familiar with them, but you both may be more open in discussing past mistakes and hopes for future improvement—since you are now the one person who can carry out and further project plans for the future. A frank discussion here can prevent bruises and false starts later.

TELL NMA WHO HAS BEEN ELECTED

Advise NMA headquarters of the new officers. Either complete the Chapter Election Results Form sent to you, or do it electronically (see Online Forms section on NMA's Web Site).

DISTRIBUTE MATERIALS TO YOUR TEAM

A Chapter Leader Training Kit is sent by NMA as soon as your election results are known to headquarters. Before distributing the manuals to other chapter officials, scan them with the objective of (1) learning what NMA recommends to various chapter officials for their leadership functions and (2) obtaining factual information about services and materials available from NMA.

MEET WITH TOP MANAGEMENT

Along with the board chairman, meet with your top organization executive(s). Usually no formal plans are made at this time, but it's an opportunity to hear directly from executive management any thoughts he/she may have on the role of the chapter in the scheme of things. This advice applies equally in community chapters as well as company/organization chapters. Most chapter leaders have been favorably surprised in these meetings to learn of the depth of understanding and interest of organization executives in chapter affairs. Ask for their continued support.

STAY ON SCHEDULE

Within 30 days following your election you should receive objectives and specific goals from the board. If they are slow in coming, jog the chairman and spur the board into action. Don't let this become a bottleneck. Ask that goals be stated in measurable terms so that progress toward their achievement can be measured during the year and at its conclusion.

STEP II

DEFINE CHAPTER GOALS

Goals must be refined and delegated, in measurable terms, to top members of your leadership team. Put the goals in writing to ensure that individual tasks are clearly understood and who bears responsibility for their successful completion. Objectives are stated in broad terms, such as "Improvement in communications among managers at all levels." Goals are stated in clearly measurable terms. A typical goal would be "Twenty-five course hours will be devoted to courses in effective reading, listening, and similar communication skills." Goals are stated in percentages and numbers, and often must be achieved by a given date. Treat goal setting as a group responsibility of the officer team.

GET COMMITMENT

This results in a stronger sense of commitment to their achievement. Your officer team will appreciate this approach to assignment of goals because they are more clearly understood and because each leader may now follow your example and continue the quantifying and delegating process. Obtain full support of the goals from those who will be responsible for their achievement. Their full and unqualified commitment to achievement of the goals is a must.

STEP III

DEVELOP THE BUDGET

Your treasurer assumes a major role in early budget preparation by contacting officers and committee leaders to determine anticipated needs, to analyze projected income and expenses, and to reconcile the two. If expenses for basic needs exceed projected income, it may be necessary to face up, however painfully, to the need for an increase in member dues. If so, don't shrink from this responsibility. Many chapters find that, because of the obvious unpleasantness of the task, they have procrastinated too long in correcting an inadequate dues structure.

AT LEAST 50-50

Keep in mind that although the organization(s) may have a financial stake in the chapter, it/they should not be asked to bear a disproportionate share of the financial burden. The organization's share should never be greater than the share borne by the membership. Ideally, the chapter should strive for financial independence. Many NMA chapters, particularly the larger ones, rely almost entirely on member dues to support all activities, including officer travel. Remember, too, that the budget is more than a statement of incoming and outgoing dollars. The budget should be interwoven into your total plan of action for goal achievement during the coming administrative year.

Consider the budget as support of your plan of action. It does not precede the plan, it follows it.

STEP IV

CHAPTER LEADER DEVELOPMENT

The Chapter Leader Training Kit provides an outline for a self-administered leadership training program for you and your team of chapter leaders.

At the conclusion of this Five-Step Plan, your officers and standing committee chairmen will have a clear understanding of (1) their functions and responsibilities, (2) chapter goals, and (3) their departmental goals stated in measurable terms.

NMA urges you, the president, to make a strong effort to get your Five-Step Plan underway promptly upon receipt of your Chapter Leader Kit.

SEE YOUR "DOCTOR"

Consider your NMA Director, and the headquarters staff as your consultants on all chapter-related problems. They are experienced and willing to help you at any time, especially in these early planning days. The NMA Web Site (www.nma1.org) is also an excellent source of information.

STEP V

PRESENT YOUR PLAN

Present your Plan of Action and Budget to the board of directors. The members will want to know that your plan is completed on schedule, that all of the board's goals have been considered, and that there is reasonable expectation that they will be achieved. Plan carefully for this presentation as it may serve as a dress rehearsal for a later presentation to organization executives. Use charts and handouts. Use "cabinet officers" in a supporting role where possible. Call on them for background information and statistics during the question-and-answer period following the presentation.

STEP VI

KEEP ADVISORS ADVISED

Present your Plan of Action and Budget to organization executive(s). This should be a joint presentation by the board chairman and president. Pay particular attention to showing how goals and actions will support organization objectives. If the subject of financial support is to be discussed at this time, be prepared to show first how the basic program would operate without organization investment, then how it is strengthened and improved when support is added.

This is the time to consider how to make the best use of organization executives in chapter activities for the coming year. If executive attendance at meetings has been spotty, with an adverse effect on member attendance, this is the time to bring up the subject.

In asking executives to become involved in chapter matters, be positive. The chapter and its activities offer the opportunity for them to communicate with the members face-to-face and, on occasion, to "tell it like it is."

This meeting concludes the planning phase of your administration and launches you into the organizing period.

STEP VII

TELL 'EM AND SELL 'EM

Now it is time to report your Plan of Action and Budget to the general membership. This calls for a new and different approach. Your objective is to arouse member interest in, and enthusiasm for, events to come. It's your inaugural address, in which you review chapter purposes, present just enough chapter history to put the present in proper perspective, and then launch your plan of action.

How objectively can you personally view your platform manner? If you can hold audience attention with the spoken word, then present your plan in the form of a rousing speech. If not, don't waste time and risk boredom with words alone. Use charts, slides, a panel, a demonstration—anything except a stand-up speech.

Organizing

Most presidents understand they need a staff of people to carry out their well-laid plans. Many, however, make the mistake of trustfully accepting and repeating the organization structure of past administrations without critical examination or thought of the possibility of the need for change.

ARE CHANGES NEEDED?

Sure, some positions of the organization chart must remain. Someone has to handle the money. Others are needed to keep minutes, answer correspondence, maintain contact with the members, conduct meetings, and handle the ongoing affairs of any organization. But has anyone taken an objective look in recent years at the structure? Is the organization chart just a piece of paper or does it truly portray who reports to whom? Does the vice president really direct and control those committees, or have previous presidents emasculated the position by running the whole show alone? Have previous presidents built a team of "comers," or have they conducted a "one-man band," taking all the bows, dominating the meetings, and discouraging creativity among other members of the team?

So, you see, this year in office may prove to be a far greater challenge and opportunity than you realized.

WHO'S BEST FOR THE JOB?

Examine the goals given you by the board. As you go down the list, form a mental picture of (1) the appropriate position on the chart to handle this responsibility and (2) the kind of person or talent needed to do the job well. Another way to say it is, there are many people who might, with a little arm-twisting, accept the job; but there may be only one who is perfect—a natural, made-to-order person who will apply enthusiasm and vision to the task and thoroughly enjoy it in the process. A large order? Yes, but attention to this concept in building your team will make the difference between just another year and a great one.

IS YOUR STRUCTURE RIGHT?

In building your team you will be controlled, in some degree, by the type of organization structure set forth in your constitution and bylaws. See the NMA Model Constitution and Bylaws for information about differences between the two structures. In the corporate structure the president selects his/her entire team including officers, while in the conventional structure, all officers—President, Vice President(s), Secretary, Treasurer—are elected by popular vote of the members. The advantage of the corporate structure is that it works well with the "president's cabinet" concept described in this guide. The president is free to surround himself/herself with people chosen for their ability and willingness to handle that job, and handle it well. Whichever type of structure you have chosen, filling the remaining key slots in your manpower chart should be considered among your most important organizing responsibilities.

Next, call a meeting of your executive officers—your "cabinet." Alert them to allow at least 2 hours for this event because there are important tasks which must be handled now in an unhurried atmosphere. Here are some examples.

REFINE YOUR GOALS

Further Refinement of Goals. Each manager of a function below the officer level must be given specific goals, quantitative and, where possible, qualitative. Goals should be so stated that both officer and manager or chairman can evaluate progress during the year and measure results at year-end.

TEAM BUILDING BEGINS

Building the Team. It is true that each executive officer should have responsibility and authority to select his/her own functional leaders and chairmen. But the executive officer should welcome the opportunity for exchange of names of candidates and some input from other leaders whose experience with the candidates in previous chapter assignments will help in placing the round peg in the round hole. Don't let them overlook anyone who has, in the past, demonstrated interest in chapter affairs and shown the ability to get things done.

WHO WILL DO WHAT?

Clarification of Responsibilities. Let your leaders know exactly what you have delegated to whom and how much. Tell them where the lines are drawn between their respective responsibilities. Some can be clearly defined right now; others may need a little time for problems to develop before clear-cut lines can be drawn. If you haven't already done so, this is the time to hand out the NMA Chapter Leader manuals.

CLIMATE FOR DECISION MAKING

Treat these officers as your Executive Committee, your "president's cabinet." Set up arrangements now to meet regularly to discuss the many administrative problems that are sure to arise in the coming year. Provide an atmosphere where such problems may be discussed and possible solutions explored. Bear in mind that the purpose of these meetings is to explore and communicate, without withdrawal of responsibilities that have been delegated to them. Keep the decision-making power in their hands. This may be difficult for you because you will see the answers too clearly, but it's important that they learn by doing, even if it means allowing them to make an occasional mistake.

GO FOR THE BEST

In organizing your team, don't fall into the same trap as have many previous presidents—that of accepting whatever and whoever is available, even though the person is not qualified. If the kind of people you need have not come forward, go out and look for them. When you find them, don't be apologetic about asking them to serve. Besides the fact that the organization needs them, which will appeal to their ego, you are offering them an opportunity for advancement of their careers. If properly approached, there are few members who will resist the offer.

Motivating

One of the four leadership principles to be applied to chapter leadership, motivating is the one for which the greatest amount of artistry is required and in which the least amount of scientific guidance is provided. For some chapter presidents it may be the most difficult to master, but for all it is potentially the most important. A highly motivated and enthusiastic team of leaders can offset an occasional dull speaker or overdone steak along the way.

ENTHUSIASM = TIME

There is never enough time to do the job as thoroughly as you would like. It behooves you, then, to build a high-spirited team because a well-motivated individual doesn't need close direction and, if this person understands and accepts responsibilities well, he/she will carry out assignments creatively without being told or asked.

GOAL INTEGRATION

Establish the kind of chapter objectives which can parallel personal needs and goals. Example, "Develop a closer relationship between executive management and the members."

POSITIVE MOTIVATION

Emphasize positive values to be gained through chapter leadership experiences. Mention new skills to be gained, new people to meet, new exposure. A chapter leader who achieves significant goals in a voluntary group has also developed the ability to survive a conventional business environment.

PERSONAL IDENTIFICATION

Lindbergh stated it in 1927 when he said "we" made it. Draw your teammates into this common effort. Keep them informed on progress and setbacks. For your term of office, strike the word "I" out of your personal vocabulary. The ultimate achievement will occur when the entire membership starts thinking in terms of "we" and "our meetings," "our budget," and "our awards."

NMA GROUP AWARDS

Potentially, one of your greatest motivators is harnessing leaders' and members' energies--driving them toward achievement of an NMA award. Striving for awards is a unifying force for members and officers. Winning the award is evidence to all officers, members, and organization executives that you are in the top two-thirds or better of NMA chapters. It obviously enhances the status of the president and his/her team when a third party (NMA) singles out your chapter for this special recognition.

Please see the NMA Recognition and Awards Guide for complete information regarding the Chapter Awards Program.

Controlling

Much of what has been written so far in this guide deals with the period before you and your team are installed in office. Now let's talk about controlling operations during the administrative year after you assume the gavel. Good control requires attention to:

- Continually reevaluating and updating your plans
- Coaching and counseling your team
- Building and maintaining relationships with your board and with organization management
- Keeping informed on NMA national events
- Presiding at monthly meeting programs
- Developing member and community relationships
- Building leadership for next year
- Handling of other problems and opportunities as they arise

Counsel and guidance from NMA on the activities above is offered in the various guides NMA provides and will not receive such treatment here. What is needed here is a pathway for the president who wants to exercise enough control to ensure meeting targets and deadlines, but avoid the constant looking-over-the-shoulder which gives other leaders the feeling they are not vested with full authority to carry out their assigned responsibilities.

HOW MUCH? HOW LITTLE?

Let's deal with the question, "How much control is needed to ensure achievement of established goals and objectives?"

Confine your visible control to those officers reporting directly to you on the organization chart. Through your periodic meetings with members of your "cabinet," you should ask frequent questions about meeting plans, reports to NMA, course attendance, special events, membership, and similar matters in chapter operations. Your objective is partly to learn what is going on, but also to learn how well informed your officers are on matters about which they should be concerned.

MANAGE BY EXCEPTION

Apply the principle of manage by exception. You need not know all details of every meeting and event through the year. But you should train officers to keep you informed of variations from the norm, good or bad. Maybe attendance rose from 35 percent in January to 70 percent in February. Why? Only five sign-ups for next week's plant tour. Why? Organization executives have not attended the last two meetings. Why?

The purpose of managing by exception is to allow you to conserve your time and energies for the bigger and the more unusual problems. Encourage officers and other leaders to exercise the same type of control with their assigned groups, thus conserving their time and energy.

When variances from the norm occur in chapter operations, find the cause. Get sufficient facts to allow you to distinguish between the symptom and the disease. Ask questions such as, "Why was meal service so poor at last month's meeting?" "Why does the sound system fail at mid-point in some meetings?" "Why is Department 3-B lagging in membership renewals?" It is not the president's job to personally conduct the research to find the answers, but he/she must ensure that someone (1) discovers the cause of these symptoms and (2) takes the necessary action to prevent their recurrence.

OBSERVE ORGANIZATIONAL BOUNDARIES

Frequently you will experience a strong temptation to give assistance or advice to committee leaders and members in the performance of their tasks. Some of them will come to you with their problems expecting an immediate solution. Your natural inclination will be to tell them on the spot how to handle the problem.

After all, you've handled similar situations on your way up, and you can tell them exactly what to do about this problem in great detail.

Be careful. Think twice before responding to such requests. Have you delegated complete authority and responsibility for this function to another officer? What happens to the organization if the vice president is bypassed? What if he/she has already given instructions which differ from yours? To whom will the member go next time he/she has a problem? If you solve this problem for this committee, you may spend the rest of the year solving every committee's problems, and where will you find time for that?

DOCUMENTING RESULTS

Next year's president will be your greatest fan if he/she receives a full history of all the important events of your administration. Instruct your team to prepare summary reports following completion of any major project. The reports should include information about goals, budget, problems overcome, problems not overcome, names of personnel and how they handled responsibility, and recommendations for the future. Does your chapter have a central file? This is a must for any degree of historical documentation.

In Addition . . .

THE MONTHLY MEETING

In this guide, emphasis has been given to the need for the president to concentrate major effort and time on executive responsibilities. There are some activities, however, which, although placed in the hands of other chapter officials, are still closely associated with you as president.

The greatest of these is the regular membership meeting. You preside at these meetings and as a result are regularly exposed to a large segment of the membership. It's an important image builder for you and the chapter, and you rightfully feel you must take part in planning and staging it, particularly early in the year while you and your team are learning to work together.

If your chapter is typical, there are some members whose attendance at chapter events is confined to a few general membership meetings a year. Their attitudes toward the chapter are built upon this brief exposure of a few hours each year. Make these meetings count. Your efforts in providing the professional touch here will pay off in increased member interest and pride in their organization.

EXECUTIVE RELATIONSHIPS

Next, take an aggressive role in developing and maintaining executive support. An easy way to do this is having an Executive Advisor for the chapter. The role of an Executive Advisor is addressed on page 19 of this guide. Most executives are favorably inclined toward the chapter, but some do not express their support publicly in positive terms because they just don't think about it. The intention probably is to avoid the appearance of domination, but this silence is often interpreted as disinterest and possibly even disapproval. Even though such symptoms may not be apparent in your chapter at this time, it is well to take preventive measures now. Positive statements from executives about the value of the chapter have a stimulating effect upon both present and potential members. This tends to clear the air and dispel doubts in the minds of some members who would be more willing to seek leadership positions if they were certain just where their boss stands. Don't let Top Management Night be the only time during the year that executive management is visible!

NMA RELATIONSHIPS

NMA represents a great deal of potential value to you in building the image of quality and professionalism in your administration. Arrange for attendance of chapter leaders at national events such as the NMA Leadership Development Conference and the NMA Annual Conference. If there is an NMA council in your region, take an active part in its affairs. These events are your greatest source of new ideas and fresh approaches to old problems. Membership in a vigorous national association is your insurance against obsolescence, loss of vitality, and deterioration into a purely social organization.

Try to develop the habit of turning to NMA before making a decision on a major problem. You may wish to call your NMA Director or someone at NMA headquarters. Many of the problems you are likely to encounter have been met and resolved by someone else before. That someone is more than willing to share his/her experience with you. This is one of the most logical, yet least considered ways, to use your Association. To associate is to share, and that's what we all need to do in NMA.

UTILIZING YOUR NMA DIRECTOR

During your administrative year, you'll discover that you can "use all the friends you can find!" From past officers to NMA staff members, you'll be picking everyone's brain from time to time. One individual with whom you should develop an especially close relationship is your assigned NMA Director.

There are three words which represent the main responsibilities of an individual who serves on the NMA Board of Directors. These three words are AID, INTERPRET, and COOPERATE.

- ✓ Directors AID chapter officers in organizing and conducting efficient chapter operations, such as planning valuable programs and placing emphasis on values and services to be gained from NMA.
- ✓ They INTERPRET NMA policies, procedures, and new developments in educational materials to executive management and officers of assigned chapters.
- ✓ Directors COOPERATE with other Directors and NMA staff in the development of policy and the formation of new NMA chapters...with councils in their activities, and...with chapters to promote teamwork and leadership development.

Directors are men and women who are endorsed by their chapters, with the support of their supervision, and serve either a three-year "term" or a one-year "appointment."

Directors are YOUR representatives on the NMA Board, and each Director is assigned one or more chapters to "represent and service." Ordinarily, you will find that Directors will have gone through the chairs in their own chapters and have a broad knowledge base when it comes to understanding chapter operations. In short, they have "been there and done that." As a result, you'll find it easy to talk with them.

To help your Director understand your chapter better, please make sure that he or she receives your chapter newsletter and any other major chapter correspondence. Invite your Director to chapter meetings, especially your "big events." Don't forget to introduce them appropriately. Remember—this is an excellent time to reinforce the chapter/NMA connection and tell the members how they are represented on the NMA Board.

The NMA Director can help explain NMA policy and new procedures and programs. Likewise, the Board meets every January, July, and during the Annual Conference. They need to be advised whenever you have issues or concerns (or a novel idea!) which you believe needs to be brought before your elected representatives.

Your NMA Director will be calling you from time to time to make sure that your needs are being met, to double-check on your planning efforts regarding upcoming NMA LDCs, and to make sure you're joining us for the Annual Conference. Directors keep an eye on membership renewals, dues payments, professional development activities, and other chapter programs. As members of the Board, Directors are asked to submit a monthly report on the health and well-being of their assigned chapters. You can make their reporting easier by initiating many conversations yourself!

In short, NMA Directors (often referred to as "Your National Directors") have "volunteered" to work with you to HELP you over the hurdles during the year. They will encourage your full participation in NMA programs, benefits, and services. All they really want from you is regular and meaningful communication! We encourage you to fully utilize this valuable NMA resource.

SOUND FINANCIAL BASE

"Champagne ideas and a beer budget" is an expression that fits the situation inherited by many NMA chapter leaders. Money isn't everything, but the financial base should be large enough to give your officers a fighting chance to reach stated objectives. A good leadership team will find it difficult, if not impossible, to produce good programs and activities without adequate resources. What's more, the problem perpetuates itself year after year. The debilitating effects of the rising cost of living on a fixed income are just as real in the chapter as in your own home. Dues and other sources of income should be reviewed periodically. If the facts indicate the need for an increase, face up to the task. It's one of those responsibilities which often make the lonely president's position even lonelier.

KEEP A SUPPLY OF NEW MEMBER PACKETS

As you may know, NMA provides packets for new members complete with NMA pins, at no cost to the chapter. This makes it possible for your Member Relations Committee (Boosters) to issue a New Member Packet soon after a new member is signed up. The cost is borne by NMA, financed by the member's registration fee.

In response to requests from many chapter leaders, these same packets are now available, on request, for purchase by chapters for distribution to "old" members. They are offered at a special cost of \$2.00 each, plus postage. This includes the full packet of literature plus an NMA membership pin. Many chapters order a supply to keep on hand for new members. That supply becomes automatically replenished when we receive your list of new members. This way, you can immediately distribute packets and not have to wait until the chapter secretary notifies NMA headquarters of "additions" before receiving the corresponding number of new member packets.

If you have any questions or wish to place an order, please call or write NMA headquarters. Likewise, if you have any suggestions for improvement of NMA services, please let us hear from you.

Summary

In summary you, as president, must devote your efforts to the total picture. Your sights are on the goals and objectives with which you were charged at the beginning of your term of office. You must detach yourself from doing such things as contacting the speaker of the evening or selecting the menu, but must ensure that these tasks will be done—and done well.

SEE THE BIG PICTURE

You are an image-builder. Your appearance and manners at the podium set the tone for the conduct and attitudes of the officers and members for the entire year. You are a team builder. While your immediate concern is the recruitment and direction of this year's leadership team, you must look to the future and develop a sound corps of leaders for next year—and thereafter.

THERE ARE REWARDS

And, last but not least, you are placing a keystone in the foundation of your own future. Your achievements, and those of your teammates, will be long remembered by those you have groomed for leadership, by the general membership, and by executive management.

It's a challenge. It will often be a chore, but never a bore. It will make frequent demands on your personal time. You may wonder at times if your immediate boss is as approving as he/she seems to be. You may feel you are carrying the whole world on your shoulders and wonder why you ever agreed to take on this impossible task.

But at year-end, if you can truthfully say you gave your very best; there is no substitute for that inner glow of pride and sense of achievement. At that time you will say "it was worth it!"

The Executive Advisor

An NMA Chapter's Link to Upper Management

The role of the Executive Advisor in the chapter operation is fundamental to its ongoing success. NMA chapters are encouraged to request the active involvement of such an individual in order that the chapter goals and objectives might better be in line with those of the corporation and/or the local community. The Advisor can speak on behalf of executive management and provide appropriate advice and counsel, both in terms of short-range planning and long-range strategy. Recently, a team of volunteer chapter leaders and NMA staff members developed the following guidelines for the direct involvement of the Executive Advisor. Specifically he or she should:

- Establish and maintain a relationship of integrity, trust, and confidentiality with the chapter and its leadership team.
- Meet with the incoming chapter president and chairman of the board to consider an agenda for each new administrative year.
- Arrange a meeting of upper management and chapter officers and directors prior to the new administrative year planning process. This meeting will provide an opportunity to discuss how the chapter activities could aid in the achievement of the sponsoring organization's goals and objectives.
- Participate in an advisory role in the planning process by remaining neutral during actual decision making, but encouraging focus when needed.
- Assist (as appropriate) in the presentation of the chapter's request for upper management financial support.
- Attend all officer and board meetings. Maintain a strictly advisory posture by allowing officers and directors to have an open dialogue and passing along only key information to upper management.
- Encourage top management and other managers to join in actively and visibly supporting the chapter at monthly meetings and other functions.
- Assist the chapter in enlisting upper-level managers as Spotlight Speakers, facilitators for chapter courses, and presenters of achievement awards.
- Act as liaison between the chapter and upper management, keeping it informed of needs and chapter successes.
- Arrange a meeting among top management and chapter officers and directors at the end of the administrative year to review goals, value-added achievements, and lessons learned.

President's Checklist

There are many details of chapter administration that are not directly your responsibility as president but which must be handled efficiently and on target by someone. Just who that someone is will differ in many chapters depending on how the president has delegated responsibilities to his/her fellow leaders.

To assist you in ensuring that these tasks will be performed and completed at the appropriate time in your "life-cycle," NMA provides this checklist for use at executive committee meetings or in a month-end review of the status quo in chapter affairs. Try to develop the habit of setting aside an hour alone in your office or home on the last day of the month. Start by asking yourself, "What actions must we take next month to ensure we will continue to meet our goals?" Some of the answers will come to you as you review the checklist and develop next month's calendar. Write notes to yourself about what action is necessary to handle the coming task, who will receive the assignments, and when they must be completed. The outlines and your notes become your monthly "Plan of Action."

The designation of 1st month, 2nd month, etc., is used here because the sequence and priority of action is determined mainly by your administrative year rather than by the calendar. To convert the checklist for your use, simply write in the name of the appropriate calendar month in the space provided at the top of each page.

The Calendar of Important Dates (NMA National Monthly Planning Supplement) lists events and dates that should be included in your monthly planning. The President's Checklist (Pre-Installation Planning Period) begins with the 60- to 90-day period from election to installation when most of your planning occurs, and should continue with one page for each month of your administrative year beginning with the month of installation.

The space labeled "Questions and Comments" provides some timely points to ponder as you prepare your monthly plan of action. Feel free to add your own "joggers" to the checklist and the questions and comments column.

In developing your calendar, make certain fixed events and control dates are posted in the proper calendar date. Your sources of information are notices and newsletters received regularly from NMA headquarters throughout the year, plus your pre-installation conferences with the outgoing chapter president, and decisions made during the Five-Step Chapter Leader Development Program. We have included a calendar with the month of NMA National events listed so you may plan for them in the appropriate month.

On the left page is your "Make It Yourself" monthly calendar. Fill in the number of the days of the month in the appropriate spaces. You are now ready to post notes on key events due to occur in the month(s) to come. For some kinds of action you may find it advisable to reach ahead a month or two in writing down these "joggers." Dates of some events are fixed well in advance by NMA, the council, company/organization policy, and community activities. Monthly membership meetings, board meetings, cabinet or executive committee meetings, and other gatherings will occur on a regularly scheduled day of the week or month. Post these on your calendar now and refer to them before scheduling yourself for other chapter, company/organization, or personal commitments.

Calendar of Important Dates

NMA National Monthly Planning Supplement

<u>January</u>	<u>February</u>	<u>March</u>
<p>NMA Board of Directors Meeting</p> <p>Look for NMA Sponsored Speaker Forms</p> <p>31st – Payroll chapters: December dues should be paid by this date</p> <p>31st – Annual chapters with December fiscal: dues should be paid by this date</p> <p>31st – R1 due for December</p>	<p>First NMA Leadership Development Conference (LDC) mailing to chapters (start making plans)</p> <p>*28th – Payroll chapters: January dues should be paid by this date</p> <p>*28th – Annual chapters with January fiscal: dues should be paid by this date</p> <p>*28th - R1 due for January (*29th if it is leap year)</p>	<p>Second NMA Leadership Development Conference (LDC) mailing to chapter (continue making plans)</p> <p>NMA Executive Board Meeting</p> <p>31st – Payroll chapters: February dues should be paid by this date</p> <p>31st – Annual chapters with February fiscal: dues should be paid by this date</p> <p>31st – R1 due for February</p>
<u>April</u>	<u>May</u>	<u>June</u>
<p>15th – Executive of the Year, Hall of Fame, McFeely Award, and Member of the Year nominations deadline</p> <p>NMA Leadership Development Conference(s) held</p> <p>30th – Payroll chapters: March dues should be paid by this date</p> <p>30th – Annual chapters with March fiscal: dues should be paid by this date</p> <p>30th – R1 due for March</p>	<p>1st – NMA Publications Contest entry deadline</p> <p>31st – Payroll chapters: April dues should be paid by this date</p> <p>31st – Annual chapters with April fiscal: dues should be paid by this date</p> <p>31st – R1 due for April</p>	<p>June NMA Board of Directors meeting</p> <p>Publications Contest, Member of the Year, Hall of Fame, McFeely Award, and Executive of the Year winners selected</p> <p>30th – Payroll chapters: May dues should be paid by this date</p> <p>30th – Annual chapters with May fiscal: dues should be paid by this date</p> <p>30th – R1 due for May</p>
<u>July</u>	<u>August</u>	<u>September</u>
<p>NMA National Conference mailing (make plans to attend)</p> <p>31st – Payroll chapters: June dues should be paid by this date</p> <p>31st – Annual chapters with June fiscal: dues should be paid by this date</p> <p>31st – R1 due for June</p>	<p>NMA National Conference mailing (continue preparations)</p> <p>31st – Payroll chapters: July dues should be paid by this date</p> <p>31st – Annual chapters with July fiscal: dues should be paid by this date</p> <p>31st – R1 due for July – watch for an announcement that it may be due August 15th in order to prepare for Awards presentations at the Annual Conference.</p>	<p>30th – Payroll chapters: August dues should be paid by this date</p> <p>30th – Annual chapters with August fiscal: dues should be paid by this date</p> <p>30th – R1 due for August</p> <p>NMA Board of Directors Meeting (or in October, possibly)</p> <p>NMA Annual Conference – this month or next, depending.</p>
<u>October</u>	<u>November</u>	<u>December</u>
<p>NMA Board of Directors Meeting (or Sept)</p> <p>NMA Annual Conference (if not Sept.)</p> <p>31st – Payroll chapters: September dues should be paid by this date</p> <p>31st – Annual chapters with September fiscal: dues should be paid by this date</p> <p>31st – R1 due for September</p>	<p>30th – Payroll chapters: October dues should be paid by this date</p> <p>30th – Annual chapters with October fiscal: dues should be paid by this date</p> <p>30th – R1 due for October</p>	<p>31st – Payroll chapters: November dues should be paid by this date</p> <p>31st – Annual chapters with November fiscal: dues should be paid by this date</p> <p>31st – R1 due for November</p>

NMA National Checklist

Checklist of Items for Insertion in Your Planning Calendars

**Chapter
President
Planning
Calendar
Updated**

- _____ The NMA Leadership Development Conferences begin in the early spring. Make preparations (budget, time off, etc.) to send two or more OFFICERS.
- _____ Submit Executive of the Year, Hall of Fame Award, and Member of the Year nomination forms by April 15th.
- _____ Submit Publications Contest entry forms by May 1st.
- _____ Check deadline for application for the NMA \$200 credit toward a Sponsored Speaker. Be sure and mail to headquarters on time.
- _____ Make budget provisions for the NMA Annual Conference, held in September, October, or November
- _____ Select chapter representative(s) for NMA's Annual Conference which is held annually. Contact NMA at 937-294-0421 or consult NMA's website for date and location.
- _____ Make final budget and time-off preparations to send two or more people to NMA's Annual Conference.
- _____ Make sure your administrative year's B3 Form (authorization to grant CEU) has been submitted to NMA.
- _____ Submit nominee for NMA McFeely Award to NMA headquarters by December 1

COMMENTS

Think about vacation time adjustments. Will you "close shop" entirely for two months or continue some alternate types of activity to hold the members' attention during this normally slack period?

President's Checklist

Pre-Installation Planning Period

<u>Calendar Month</u>

Begun

Completed

- | | | |
|-------|-------|---|
| _____ | _____ | Send or fax election results (names of officers) to NMA headquarters promptly after election (or utilize NMA's Web Site). |
| _____ | _____ | All standing committees and other key positions are filled. |
| _____ | _____ | Arrange transition meeting(s) with current president to discuss current problems and trends. |
| _____ | _____ | Pre-goal-setting meeting with Executive Advisory Committee to obtain company/organization goals and to correlate them with chapter goals. |
| _____ | _____ | Translate objectives into measurable goals. Publish goals. |
| _____ | _____ | Provide opportunity for members to continue studies to earn the NMA Certificate in Management Studies. |
| _____ | _____ | Prepare budget and determine adequacy of income. Advise committees of their budgetary allocation. |
| _____ | _____ | Begin Five-Step Chapter Leader Development Program. |
| _____ | _____ | Present budget and plan of action for achievement of objectives to board. |
| _____ | _____ | Present budget and plan of action to chapter's Executive Advisory Committee. |
| _____ | _____ | All officers and chairmen have received copies of the constitution and bylaws, including position descriptions. |
| _____ | _____ | Incorporate NMA awards requirements into the goals where appropriate. |
| _____ | _____ | Arrange for "gifts" or recognition for outgoing officers. |
| _____ | _____ | Begin planning to attend NMA Leadership Development Conference (LDC). |

President's Checklist #1



Begun

Completed

- | | | |
|-------|-------|--|
| _____ | _____ | Are installation plans complete to include arrangements for NMA Director, company/organization executives, etc.? |
| _____ | _____ | Have plans for the year's activities been communicated to the membership? |
| _____ | _____ | Review chapter organization structure. Is present structure workable? |
| _____ | _____ | Are standing committees filled? |
| _____ | _____ | Has every committee held at least one meeting? |
| _____ | _____ | Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30th. Have you set up procedures to ensure that ALL activities will be reported in future reports? Are you on track to receive the Excellent/Superior/Outstanding Awards? |
| _____ | _____ | Set date for member indoctrination meeting, directed to new, but available to all, members. |
| _____ | _____ | Has a past president's pin been ordered? |
| _____ | _____ | Has the past president's certificate for outstanding service been received from NMA headquarters? |
| _____ | _____ | Has your chapter been declared qualified to issue Continuing Education Units? (See Professional Development Guide for details.) |

QUESTIONS AND COMMENTS

If a membership drive is to be conducted, now is the time to lay plans and select and train your team. This could be a key factor in budgetary planning.

CEU credit for members attending your professional development courses can be issued only after your chapter has received authorization from NMA headquarters. If not certain, instruct your Professional Development Chairman to check with NMA headquarters.

President's Checklist #2



Begun

Completed

_____	_____	Request report from Secretary on progress to date in meeting requirements for all awards included in your stated goals.
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30th. Are you on track to receive the Excellent/Superior/Outstanding Awards?
_____	_____	This may be a good month for your first new member indoctrination meeting.
_____	_____	Are committees submitting written reports regularly? Are they complete? Do they indicate planning and action?

QUESTIONS AND COMMENTS

As in many large associations, the average NMA member understands little about his/her organization's services, benefits, or even reason for existence. Since its services are mainly chapter oriented, NMA must rely upon its chapter leaders to "tell and sell" NMA to the membership. How will you handle this?

Review item. Check last month's checklist for items not completed during the first month. What do the members need? (Not necessarily the same as "What do they want?") Was your first general membership meeting successful? How can future meetings be improved? Did the Member Relations (Booster) Committee do its job as planned?

NMA is a strong supporter of the Institute of Certified Professional Managers (ICPM). For members interested in qualifying for the CM designation, your chapter can conduct courses to prepare them to sit for the examination. Literature is provided in your Chapter Leader Training Kit.

President's Checklist #3



Begun

Completed

_____	_____	Final membership renewals to NMA this month, if chapter is not on payroll deduction
_____	_____	Is there good balance in the membership, i.e., are the various levels of people in the organization represented in proportion to their total population? If large groups such as "production supervisors or the office" are missing or poorly represented, there is a special selling job to be done.
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30 th . Are you on track to receive the Excellent/ Superior/ Outstanding Awards?

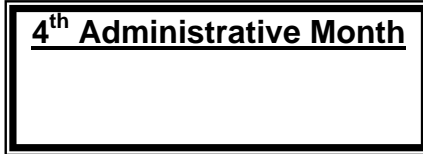
QUESTIONS AND COMMENTS

Remember that R1 group award reports must be filed for every month of the year, even including summer months or other inactive periods. Don't risk losing out on an award simply because the Secretary is negligent in reporting. Remember, it can be done electronically!

Is attendance holding up at executive committee/cabinet meetings? If not, act now—removing and replacing if necessary.

Have professional development courses begun? There should be some action by this time. Use your Educational Dividend to obtain free course and program materials. Refer to the Professional Development Guide if you have any questions.

President's Checklist #4



Begun

Completed

- | | | |
|-------|-------|--|
| _____ | _____ | Review your first quarter budget experience. Does it appear to be in proper balance? Is income coming through as predicted? |
| _____ | _____ | Are organization executives attending meetings and showing interest generally? If not, some consultation with your Executive Advisory Committee is in order. |
| _____ | _____ | Monthly Activity Report R1 (for prior month) must be e- mailed not later than the 30 th . Are you on track to receive the Excellent/Superior/ Outstanding Awards? |

QUESTIONS AND COMMENTS

The first quarter has passed. It is time to review past progress and look to the future. Are your goals well understood by those who must achieve them?

Plan for a quarterly progress review with the board. At the present pace will you achieve your objectives? Are your activities leading you to successful achievement of chapter purposes?

Are ALL officers and chairmen fulfilling their responsibilities? Have there been changes in their work assignments, travel, etc., which prevent them from doing the job properly?

President's Checklist #5



Begun

Completed

_____	_____	Are you "clueing in" your vice president, grooming him/her to assume the presidency next year?
_____	_____	Has new chapter promotion activity begun? Have you invited any executives to be guests at your membership meetings?
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30 th . Are you on track to receive the Excellent/Superior/ Outstanding Awards?

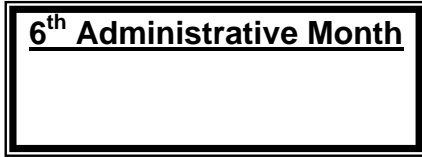
QUESTIONS AND COMMENTS

Are you successfully applying the "management-by-exception" rule, or are you the "one-man-band" leader who denies decision-making experiences to others?

Do the members feel their leaders are responsive to their needs? Do they feel like integral parts of the whole, or do they feel left out? Is someone conducting personal interviews to obtain this information?

It is time for another officer to "get his/her feet wet" by taking charge of a monthly membership meeting. This is part of the grooming process, and the experience may encourage others to run for office next year.

President's Checklist #6



Begun

Completed

Start looking ahead to the next few months. What effect will vacations have on your leadership and cabinet meetings and plans? Take the necessary steps now to handle this problem.

Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30th. Are you on track to receive the Excellent/Superior/ Outstanding Awards?

QUESTIONS AND COMMENTS

Some people feel that every member should play some active role in the chapter at some time during the year. Do you agree with this thought? If so, there is still a half year remaining to achieve it. How will you approach it?

Has one (or more) executive advisor(s) attended at least one board meeting?

Your Member Relations (Booster) Committee should hold a second pep and information meeting about this time.

President's Checklist #7



Begun

Completed

If you plan to launch some NMA Professional Development courses later this year, select and order them now to ensure availability of your selection at your chosen time.

Is attendance at monthly membership meetings reaching your goals? If not, some investigation is needed to determine the cause. Assign this task to someone who is thorough and honest-to-a-fault. If someone at the head table is driving the members away (possibly you?), it must be brought into the open and corrected.

Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30th. Are you on track to receive the Excellent/Superior/ Outstanding Awards?

QUESTIONS AND COMMENTS

Are the constitution and/or bylaws up-to-date? When were they last revised? Does every new member receive a copy? (If not revised in the past two years, chances are they need careful review and possible updating.)

If the winning of an NMA Award is in your goals, this is a good time to review records, reports, and other evidence of past performance to see how you are doing. Try a call to NMA headquarters to learn what their records show.

This is a good time for mid-year review of finances to determine if income and expenses have been as predicted.

President's Checklist #8



Begun

Completed

Make sure dues and membership reports are being submitted to NMA headquarters on time. Late dues can disqualify your chapter from receiving and/or giving awards for the administrative year.

Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30th. Are you on track to receive the Excellent/Superior/Outstanding Awards?

QUESTIONS AND COMMENTS

In the spring and summer many members turn to recreational and social activities. It is not a good time to expect to successfully launch educational courses, but it is a good time to start planning them.

Perhaps this is also a good time to ponder the question, "What is the proper amount of emphasis, publicity, and budget to be given to such events as sports night, golf outings, baseball and football games, a day at a recreation park, family picnic, spouse/guest night, etc.?" Are such events in proper balance in your chapter?

Nominations will soon be made for next year's officers. It is your responsibility to call to the attention of the nominating committee all members of your team who have performed well.

In relation to the above, it is also your responsibility to take the necessary action, as discreetly as possible, to prevent a candidate who has demonstrated that he/she is not qualified from "moving through the chairs."

President's Checklist #9



Begun	Completed	
_____	_____	This is a good time to launch strong publicity campaigns to bring the members back into the fold and start again to "think NMA."
_____	_____	Build renewed interest and enthusiasm in your cabinet and your entire leadership team. Combat the tendency for leaders to slack off as year-end approaches.
_____	_____	Is year-end lethargy among the members getting an early start? Is meeting attendance dragging? If so, it's time to increase publicity and booster activities, and put some schmaltz into your program, and your meeting notices.
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30 th . Are you on track to receive the Excellent/Superior/Outstanding Awards?
_____	_____	
_____	_____	

QUESTIONS AND COMMENTS

You will soon be called upon to serve as an analyst and conduct yourself as a statesman. This month, or next, there will be the annual election of officers. The president-elect may ask (and has the right to do so) these questions: "Is this chapter achieving its potential for the members?" and "What are the problems facing the organization today?"

Try to judge the chapter, its people, and its record objectively as you prepare for this meeting.

President's Checklist #10

10th Administrative Month

Begun

Completed

_____	_____	Your vice president's internship is near completion. Has he/she been given gradually increasing responsibilities? Will he/she be ready to assume full responsibility in two months if elected to the presidency?
_____	_____	Examine the performance of all chapter officers. Are they ready, willing, and able to handle the next step upward?
_____	_____	New candidates for office and the board will be needed soon. Start now to quietly search for new faces and interested potential candidates.
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30 th . Are you on track to receive the Excellent/Superior/Outstanding Awards?

QUESTIONS AND COMMENTS

The third quarter is behind you. Time to measure progress. At your present rate will you achieve your goals?

Are the goals still adequate? Too low? Too high?

One of your more subtle objectives has been to assist the organization in the achievement of its goals. Is this happening? Perhaps a meeting with executive advisors can help you in answering this question.

Are you gathering statistics and other material for a complete year-end report?

President's Checklist #11



Begun	Completed	
_____	_____	Election of new officers should take place this month or perhaps last. Ensure that election results are sent to NMA headquarters to arrange prompt delivery of the Chapter Leader Training Kit.
_____	_____	Arrange meeting with the president-elect. Share your ups and downs in an effort to avoid repeating your mistakes.
_____	_____	Help him/her to develop plans for next year which will continue where your administration leaves off, rather than "reinvent the wheel."
_____	_____	Tell him/her which people have done well (or poorly) in handling their assignments.
_____	_____	Set a date for a transfer of responsibilities meeting between old and new leaders.
_____	_____	Plan membership meeting programs and professional development courses for at least the first two months of the next administration.
_____	_____	Monthly Activity Report R1 (for prior month) must be e-mailed not later than the 30 th . Are you on track to receive the Excellent/Superior/Outstanding Awards?

QUESTIONS AND COMMENTS

Don't sit back and relax yet. The year is far from over. Don't allow the team to wind down either. Planning for your administration should have been completed months ago. It is time now to plan an orderly transfer of responsibilities to the next administration. Pass on to the new president some thoughts on what you'd do if you had this year to live over again. Ask, and offer answers to, such questions as, "Are elections held at the right time of the year for us?" Do officers and chairmen receive adequate and timely training to allow them to properly handle their responsibilities?"

President's Checklist #12



Begun

Completed

- | | | |
|-------|-------|---|
| _____ | _____ | Documentation of past events, and preparation for orderly transition to the new president is your main concern this month. Is your house in order? Are the records clearer and more complete than when you took over? |
| _____ | _____ | You may be eligible for an NMA Award in the next 30 days. Review the requirements and assemble all the evidence now while the team is still together. |
| _____ | _____ | Report the Step V Meeting on the R1 Chapter Monthly Activity Report. |
| _____ | _____ | Monthly Activity Report R1 (for prior month) must be e-mailed. Since this is your last report of the year, it is imperative that NMA receive it by the 30 th . |

QUESTIONS AND COMMENTS

Old presidents just fade away in a great number of NMA chapters. This is a decided loss to the chapter and NMA. As the "immediate past" you have much to offer in helping the new officers maintain momentum. Later as a "past" you can become the sage who helps everyone, leaders and members, develop a better understanding of NMA, its purposes, its benefits, and its role in business and industry.

And now the big one. Is this a better organization than it was when you took over?

To improve chances for a successful transfer of responsibilities to the next administration, hold a joint meeting attended by all the outgoing officers and committee chairmen, and their successors in the new administration. Seat the "old" and the "new" for each chapter office together and turn them loose to cover all the necessary details. This is the Step V Meeting advocated by NMA.

One more thought: If the budget allows it, hold an appreciation dinner for your hard-working team.

A Final Word

This is only the beginning!

You will receive lots of information in the coming year and which should be kept in one central place for reference during business meetings, telephone calls, and similar occasions. Here are some of the items you may wish to include:

CHAPTER BUSINESS

- Chapter Constitution and Bylaws
- NMA Model Constitution
- Chapter newsletter
- Chapter meeting programs and announcements
- Minutes of board meetings
- Financial statements, reports, budget
- Executive management correspondence
- Statement of chapter goals
- Committee reports

NMA COUNCIL BUSINESS

- Council correspondence, announcements, etc.

NMA BUSINESS

- Correspondence from NMA
- NMA Director correspondence
- Awards and Recognition correspondence
- Notices regarding LDCs and the Annual Conference

COMMUNITY SERVICES RELATED CORRESPONDENCE

NMA SPEECH CONTEST INFORMATION

PROFESSIONAL DEVELOPMENT

Showcasing the Value of an NMA Chapter

Measuring the ROI - Return on Investment

What is your chapter bringing to the table?

How is it advancing the company's or community's mission?

What is it "returning" to the company or community?

How can you "quantify" it?

An NMA chapter exists for the benefit of its members and its sponsoring company/organization or community. In today's complex business world, that means that it must be able to showcase its value-added nature... that it must justify its existence... and that it must be seen as a business partner in achieving shared visions and missions.

One avenue popular in NMA circles has been an activity of tracking the chapter's activities and programs, keeping track of the number of participants and the time involved, assigning a dollar "cost" or "benefit" amount to that activity, and charting the totality of the chapter year.

The idea? That if you carefully monitor your NMA year, keep track of all the positive elements of the chapter, and make an effort to quantify it, you'd be surprised at the "value-adds" which your chapter makes to the organization or community.

On the following pages are samples of how some chapters recently attempted to record, quantify, and report their successes. Some of them invited their CEO to the last meeting of the year and asked him/her to come forward and receive a "check"... a chapter check blown up and posted on foam board. The check was presented as representative of the company's return on investment for supporting the chapter.

Each chapter and each sponsoring organization is different. NMA suggests that any similar activity be undertaken with the advice and consent of your executive advisors. As in all data reports, facts and figures can be misinterpreted. We caution you that engaging in this activity will almost certainly win nods of approval from executive management, but as in all business cases, "perception" is reality... and you certainly want to present the Value-Added Benefits in their very best light. The advice and counsel of your executive advisor will be critical in determining the best approach for you to take.

NMA Value Justification

Developed by NASA White Sands Chapter #601
Las Cruces, NM

TRAINING OR COMMUNITY ACTIVITY	NUMBER OF PARTICIPANTS	HOURS PER EVENT	TOTAL HOURS	HOURLY COST	TOTAL VALUE
Training:					
Certified Managers Training	8 students for 3 courses	20 hours for each course	480	\$ 20.00	\$ 9,600.00
Certified Managers Training	10 students for 3 courses	20 hours for each course	600	\$ 20.00	\$ 12,000.00
Law for the Layman Training	12 students for 1 course	14 hours for each course	168	\$ 20.00	\$ 3,360.00
Unorganized Manager Training	20 students for 1 course	1 hour course	20	\$ 20.00	\$ 400.00
How to Have a Terrific Day Training	20 students for 1 course	1 hour course	20	\$ 20.00	\$ 400.00
Community Service Projects:					
Cemetery Clean-up	1 participant	4 hours	4	\$ 20.00	\$ 80.00
Cemetery Clean-up	4 participants	2.5 hours per person	10	\$ 20.00	\$ 200.00
March of Dimes Walkathon	7 participants	4 hours per person	28	\$ 20.00	\$ 560.00
Special Olympics	1 participant	4 hours per person	4	\$ 20.00	\$ 80.00
Speech Contest	9 participants	varied	34	\$ 20.00	\$ 680.00
Other:					
Annual NMA Conference	4 participants	24 hours per person	96	\$ 20.00	\$ 1,920.00
CMC	2 participants	24 hours per person	48	\$ 20.00	\$ 960.00
Total Quality Management Presentation	20 participants	1 hour course	20	\$ 20.00	\$ 400.00
GRAND TOTAL					\$ 30,640.00

NMA Value Justification

Developed by Lockheed Martin Leadership Assoc. #611
Moorestown, NJ

Chapter Activities	Number Of Volunteers		MINIMUM VALUE IN \$		Total est.
	Involved	Hours	Ea. Vol.	Sub-Total	Value to LMC
Programs					
Saving for your future (2 sites)	45	1	\$25	\$1,125	
Estate planning	43	1	\$25	\$1,075	
Administration			\$0	\$0	
			\$0	\$0	
			\$0	\$0	
			\$0	\$0	
					\$2,200
Member Relations					
Membership luncheon (LMTS)	23	1	\$25	\$575	
Membership luncheon (NE&SS-M) early	26	0.5	\$13	\$325	
Membership luncheon (NE&SS-M) late	40	1	\$25	\$1,000	
General Membership Dinner	84	3.5	\$88	\$7,350	
Administration	2	4	\$100	\$200	
Planning	1	22	\$550	\$550	
handouts	2	5	\$125	\$250	
	2	2	\$50	\$100	
yearlong	2	\$50	\$1,250	\$2,500	
					\$12,850
Professional Development					
CM program 3rd Phase	13	28	\$700	\$9,100	
CM program 1st Phase	18	28	\$700	\$12,600	
CM program 2nd Phase	18	28	\$700	\$12,600	
CM Luncheon	17	1	\$25	\$425	
Administration	1	40	\$1,000	\$1,000	
	2	16	\$400	\$800	
					\$36,525
Public relations					
Web Site	1	120	\$3,000	\$3,000	
Newsletter (1x4x12)	1	48	\$1,200	\$1,200	
Newsletter (5x1x12)	1	60	\$1,500	\$1,500	
Advertisements (flyers, emails, posters)	1	10	\$250	\$250	
Media generation	1	50	\$1,250	\$1,250	
Administration	1	50	\$1,250	\$1,250	
					\$8,450

Lockheed Martin Leadership Assoc. #611 - continues

Chapter Activities	Number of Volunteers		MINIMUM VALUE IN \$		Total est. Value to LMC
	Involved	Hours	Ea. Vol.	Sub-Total	
Social Services					
Administration	1	10	\$250	\$250	
					\$ 250.00
Community Services					
Habitat for Humanity 3/27/99	10	6	\$150	\$1,500	
Habitat for Humanity 7/31/99	10	6	\$150	\$1,500	
Habitat for Humanity 9/18/99	10	6	\$150	\$1,500	
Big Brothers, Big Sisters Bowl-athon	6	2.5	\$63	\$375	
Adopt-A-Highway	18	4	\$100	\$1,800	
JDF (Walkathon)	12	3	\$75	\$900	
Canned food Drive			\$0	\$0	
American Cancer Society (cycle race)			\$0	\$0	
Angel Tree			\$0	\$0	
Speech Contest	2	25	\$625	\$1,250	
Speech Contest	11	3	\$75	\$825	
Speech Contest	4	2	\$50	\$200	
Cell Phone Drive	20	3	\$75	\$1,500	
Cell Phone Drive	1	10	\$250	\$250	
Blood Bank Drive			\$0	\$0	
Dooley House (Walkathon)	43	3	\$75	\$3,225	
Golf Tournament	6	1.5	\$38	\$225	
Golf Tournament	1	10	\$250	\$250	
Golf Tournament	6	4	\$100	\$600	
Heart Walk			\$0	\$0	
Administration	1	50	\$1,250	\$1,250	
					\$ 17,150.00
NOVA+ Board					
Treasurer	1	24	\$600	\$600	
Secretary	1	25	\$625	\$625	
Board meetings x12 meetings	6	1.5	\$38	\$225	
12 months x 2 hrs.	1	24	\$600	\$600	
Vice president	1	75	\$1,875	\$1,875	
Vice president	1	50	\$1,250	\$1,250	
Vice president	1	50	\$1,250	\$1,250	
President	1	150	\$3,750	\$3,750	
					\$10,175
				Total	\$ 87,600.00

NMA Value Justification

Developed by Idaho Leadership Dev. Assoc. #500
Idaho Falls, ID

Company Goal	R-2 Activity	PTS	Results	Value-Added
Reengineering Core Processes	Chapter Management			
	Chapter Organization Chart	2	New Company Management briefed on NMA Chapter Value-added.	
	Trained Leader Program	2	Company Financial Support pledged.	
	Advanced Program Plan	2		
	Goals and Objectives	2		
	Budget	2		
	Dues submitted on time	Req		
Consistent, open, 2-way communication	Communications			
	Chapter Guide	5	Regular Top Management Column in monthly publication.	
	Newsletter Published	5		
	Both Electronic & Hard Copy	1	Monthly editions with all features included.	
	Code Of Ethics Printed	1		
	State NMA Principals	1		
	Enter NMA Pub Contest	4		
	Placement in Contest	1-3	1998 – 1999 First Place Publication Award.	
	PD Course Notice	1		
	Monthly Meeting Notice	1		
Create/Update Home Page	2			
Link to National Home Page	1			
Increasing Diversity in Management	Chapter Board of Directors			
	Board of Directors Meetings	3	First represented employee elected by the BOD to serve as Executive VP.	Supervisory Skills classes: 1050 hours = \$31.5K cost saving Certified Managers: 606 hours = \$18.2K cost saving
	National Director Invited	1	4 VPs appointed to serve on Executive Board.	
	Nat. Director's Name Submitted	1		
	Exec Advisors Meetings	3	National Director elected in 1998.	
	Exec Advisor Names Submitted	2		
Board Minutes sent to Director	1	2 Executive Advisors named.		
Support Professional Development	Professional Development			
	Authorized to Grant CEU's	5	Partnered with Company Professional Development to offer Management Series.	Held 4 workshops: 1100 hours = @33.0K cost saving
	PD Catalogue/Guide	3	"Leadership Laboratory" to Fosters Professional and Personal Growth Opportunities	
	NMA Courses Completed	2-5		
	Non-NMA Courses Comp	1-3		
	Bonus Points Each. Course >7hr.	1-3		
Executive Mgmt Involvement	1	Management presented Awards and Certificates		
Support Top Management	Membership Meetings			
	Monthly Meetings	5	Build on Current Monthly Meeting Sponsorship.	
	Feature Pro-Growth Speaker	1	Co-Sponsored Meetings/VP	
	Meeting Attendance Bonus Points	1-5	Sponsored Tables/VP Seated at Open Table.	
	Top MGMT Night Meeting	3		
	Number of Employees & Members	1		
Consistent, open, 2-way communication	Member Relations			
	Booster Training Program	3	Positioned staff to work at the members level (work in the trenches)	
	Booster News Letter	3	110 new members this year	
	Member Promo > 30days	5		
	New Member Orientation	2		

Idaho Leadership Dev. Assoc. #500 - continued

Company Goal	R-2 Activity	PTS	Results	Value-Added
Support Professional Development	National/Area Council Activity		Chapter Leadership attended CMC and National Conference	CMC and National Attendance: 432 hours = \$ 13.0K
	Participation in CMC	3		
	1pt for ea. Additional Person	1		
	Participate - Annual Conference	3		
	1pt for ea. Additional Person	1		
	Area NMA Activity	2		
Support Professional Development	Certified Manager Program			
	Submit Chairman's Name	2		
	Members Taking CM Exam	3		
	CM Informational Meeting	1		
	CM Workshop held	3		
	CM Article in Chptr. Pub	3		
Consistent, open, 2-way communication	Association Development		Support JSF Family Night	
	Workshop of Eligible Co.	5		
	Trade Show Booth	3		
	Open House @ Mo. Mtg	3		
	New Chapter Devel Promo	3		
	Steering Mtg w/Prospect Chp	2-5		
	New Chp Kit frm Hdqtrs	5		
	Mtg w/Chp Rep & Mkg Rep	5		
	Formation & Charter of Chp	5		
	Chapter Internal Growth	10		
	Bonus for Internal Growth	1-3		
Support Top Management	Association Image		All requests from Top Management were supported. Local Newspaper runs feature article on association activities Silver Knight Award presented to outgoing Executive Board Chair Leadership Award presented to outgoing President	
	Press Coverage on NMA	3		
	Present Silver Knight	3		
	Present Other Chapter Award	1		
	Nominate Exec of the Year	1		
	Bonus EOY Nominee Wins	1		
	Nominate Hall of Fame	1		
	Bonus HOF Nominee Wins	1		
	Nominate Member of Year	1		
	Bonus MOY Nominee Wins	1		
	Gold Knight Nominee(council)	1		
	GK Nominee Wins	1		
Support Community Schools	American Enterprise		Speech Contest held for 5 community schools School Supplies in August Program Adopted – 300 children served	Community Activities: 284 hours = \$ 8.5K
	Speech Contest	5		
	Bonus - Win Council Level	1		
	Bonus - Win Area Level	1		
	Bonus - Win National	1		
	Junior Achievement	3		
	AE or Economic Program	3		
	Project Business	3		
	Adopt-a-School	3		
	AE News Coverage	1		
	Mo. Mtg Featured AE Speaker	2		
	3rd, 2nd or 1st Place	1-3		
	AE Courses Completed	5		
AE Committee Meetings	2			
Support Top Management	Management Week In America			
	Participation in MWIA	3		
	MWA Proclamation	3		
	Bonus MWA Proclamation	2		
	MWA Resolution	3		
	Bonus MWA Resolution	2		
	Local Mgr of the Year	3		
	MWA News Article/Media	1		

Idaho Leadership Dev. Assoc. #500 - continued

Company Goal	R-2 Activity	PTS	Results	Value-Added
Company Community Support Initiatives	Civic Activities Special Olympics MOD Walk-a-Thon Thanksgiving Food Pgm Bell Ringing Salvation Army Other Civic Activities	3 3 3 3 3	The LMFWMA Offers an Avenue for Community Service Based on Teamwork Where an Individual Participates Through Established Relationships. LMFWMA Membership Dues Receipts This Year: Chapter: \$169,157 National: \$99,036 9031 Volunteer Hours x \$14.42 = Mission Success	Presented the Company President a 2' x 4' check for \$130,227 \$70,121 used to support Scholarships, Jr. Achievement, Community Service, Speech Contest, Professional and Personal Development, Monthly Programs, Office Secretary, Adopt-A-School, Explorers, Essay Contest, and Youth Sports

NMA Value Justification

Idaho Leadership Dev. Assoc. #500 Idaho Falls, ID

ACTIVITY	NUMBER OF PARTICIPANTS	HOURS PER EVENT	TOTAL HOURS	HOURLY COST	TOTAL VALUE
Supervisory management					
Introduction to Supervision	15	14	210	30	\$6,300
Management Principles	15	14	210	30	\$6,300
Communication Skills	15	14	210	30	\$6,300
Interpersonal Relationships	15	14	210	30	\$6,300
Developing Employee Performance	15	14	210	30	\$6,300
Totals	75	70	1050		\$31,500
Certified Manager					
Personal Skills	52	3	156	30	\$4,680
Administrative Skills	52	3	156	30	\$4,680
Interpersonal Skills	52	3	156	30	\$4,680
Totals	156	9	468	90	\$14,040
Certified Manager					
Personal Skills	23	3	69	30	\$2,070
Administrative Skills	23	3	69	30	\$2,070
Totals	46	24	138		\$4,140
Total CM					\$18,180
Workshops					
March	150	2	300	30	\$9,000
June	100	2	200	30	\$6,000
September	100	2	200	30	\$6,000
January	75	2	150	30	\$4,500
March	75	2	150	30	\$4,500
June	50	2	100	30	\$3,000
Totals	550	12	1100		\$33,000
Community					
Hillcrest High School, 1998	30	3	90	30	\$2,700
Regional Business Management	18	3	54	30	\$1,620
Hillcrest High School, 1999	29	3	87	30	\$2,610
Heritage Festival	17	1	17	30	\$510
Speech Contest	3	10	30	30	\$900
County Extension Agents	3	2	6	30	\$180
Totals	100	22	284		\$8,520

Idaho Leadership Dev. Assoc. #500 - continued

ACTIVITY	NUMBER OF PARTICIPANTS	HOURS PER EVENT	TOTAL HOURS	HOURLY COST	TOTAL VALUE
Leadership					
LDC	6	24	144	30	\$4,320
NMA Annual Conference	5	24	120	30	\$3,600
LDC	7	24	168	30	\$5,040
Totals	18	72	432		\$12,960
TOTAL VALUE					\$104,160

NMA Value Added
\$104.2K

