

GUIDEBOOK

Chapter Leadership Training

Vice President's Guide



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

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Introduction

This booklet serves a dual function. It is a guide to you, the chapter vice president, as you perform your roles as assistant president, director of operations, and the one who gets things done. Part of it also serves as the chapter leader's handbook, covering a wide range of "how to" suggestions for your use in guiding and directing committee chairmen in handling their responsibilities.

It is recommended and assumed here that all committee action is under the direct supervision of the vice president(s), the secretary, and the treasurer, and that the president directly supervises none of the operating committees. These officers, whether elected by member vote or appointed by the president, become the "president's cabinet," serving in a double capacity as administrators and advisors.

This guide covers a wide range of subjects and activities because your responsibilities as vice president extend into virtually every function, every meeting, and every relationship in the chapter. In this manner you are preparing yourself to qualify for the presidency next year.

As vice president you may serve in any of several roles depending on past policy and on the president's managerial style. Some of the most common roles to which you may be assigned are:

- Serving as a member of the president's executive committee, and participating in the decisions and actions of the executive group
- Directing committees as assigned
- Serving as liaison between the officers and all other working groups and individuals
- Serving as special advisor and assistant to the president

Your responsibilities as vice president are likely to be many and varied, a condition that often makes it difficult to come to grips with specific problems and tasks. The material in this guide is rather broad and all-inclusive, relating to many areas of activity since your responsibility will cut across all areas of chapter management. Included is information about projects that you might wish to consider, but which are not clearly the responsibility of current standing or special committees.

Some of the contents of this guide are aimed directly at the vice president and your personal responsibilities; other sections are to serve as a pattern for you in counseling and training other leaders under your direction. Therefore, a listing of functions and responsibilities of various officers and major committee chairmen has also been included. With modification as needed, these can be reproduced and used in early planning meetings to acquaint these leaders with their duties and establish their goals. You and other chapter leaders will soon be conducting a goal-setting meeting, attended by all officers and major committee chairmen. Start planning now for this event by:

- Carefully studying the contents of this guide, making notes of those items on which you will want more information or have a question
- Participating in a meeting of the executive committee and other leaders in which tentative goals are set
- Translating these goals into department or project goals, to include theme, budget, and holdover commitments from last year (speakers, long-range plans, etc.)

- Communicating these goals in measurable terms to all the officers and chapter leaders under your direction;
- Making sure you send your leadership team to a NMA Leadership Development Conference held in the spring of each year. The LDCs are designed to educate, inform and motivate incoming chapter officers and get them started on the right foot.

One of the fundamentals of effective chapter management is participation in the NMA Awards Program. For the Excellent Award there are some requirements to be met, or at least begun, before installation of officers. To avoid regrets later, the vice president should take early steps to ensure the chapter will not be "caught short" at the end of the year.

The successful vice president is often a shadowy figure who stays out of the limelight. Only a few insiders know how you have cajoled here, threatened there, made crooked paths straight, and smoothed ruffled feathers in your efforts to keep the chapter on its proper course and direction. It is a measure of your skill if you are able to handle these responsibilities without upstaging the president.

Vice-President – "A Quick Look"

These, in brief and perhaps oversimplified terms, are the makeup of a good vice president.

MAJOR DUTIES & RESPONSIBILITIES

- Acts as "assistant" president - able to fill in if chapter president is unavailable.
- Supervises/oversees standing committees, making sure that regular meetings are held, reports filed, and membership kept informed.
- Serves as a liaison between chapter officers / executive committee and the chapter membership.
- Helps to make sure chapter is "on target" with its participation in the NMA Awards Program and encourages chapter to use the R1 Program as a "blueprint for success."
- Maintains strong communication ties with all volunteers and chapter members; serves as an extra "set of eyes and ears"; may assume role of ombudsman.
- Promotes interaction with upper management/community leaders to build executive support.
- Keeps good notes on this year's activities in preparation for next year.
- Arranges orderly transfer of duties and responsibilities at year's end.
- Double checks to see that appropriate officers plan to attend and *get registered for the regional NMA Leadership Development Conference (LDC) and the Annual NMA Conference.*

Chapter Objectives

The vice president will play a strong role in overseeing other chapter leaders in their efforts to achieve their goals. You should, therefore, play an equally strong role in the establishment of chapter objectives and in translating them into departmental goals.

Each chapter needs to set up its long-range purposes and one year objectives and goals. A newly organized chapter will find a statement of goals to be particularly helpful. But no group, however new or old, should permit its stated purposes to become Holy Writ. They should be reexamined regularly, challenged when necessary, and adapted to meet changing conditions.

The first rule? Tie the chapter's objectives directly to those of the company (and/or its "vision" and "mission" statements). You exist to add value to the organization, to the members, and to the community. Community chapters need to respond to business and community leaders who have publicly expressed their "vision" for your city or suburb.

Each new member receives a new member packet containing informational material about the NMA. Occasional spotlight features can be devoted to presenting information about the NMA Code of Ethics, new services and benefits, and similar information.

Every NMA chapter is encouraged to conduct an annual New Member Indoctrination meeting in which the officers and other key people present information to new members about the purposes of NMA and the chapter. New members should be encouraged to join with other members in an effort to achieve chapter goals by participating in educational activities and other events.

An ideal source of inspiration for chapter level objectives and goals is the NMA Awards Program. Whether or not your chapter actively pursues an award, the requirements for the Excellent, Superior, and Outstanding Achievement Awards are designed to lead the chapter to a year of great accomplishments. For further details, see the NMA Awards Guide. The Chapter Monthly Activity Report R1 can be downloaded from NMA's website at: <http://nma1.org>. Go to the Download Directory under "Quick Tools".

The Best Piece of Advice We Can Give You?

At the end of the year be prepared to speak to the value-added benefits of your NMA chapter. As V.P. you are in the best position to "track" all of the chapter's accomplishments during the year. Make sure that the company's or community's objectives are front-and-center throughout the year... and that the chapter's are closely aligned.

Keep good records via a "benefits folder"... events held, meetings concluded, activities recorded, people participating, and hours devoted to your causes. At the end of the year, you'll have a complete record and be able to compile your "report" with ease.

Communications

The vice president usually has little direct responsibility for maintaining communications with the general membership. This is an advantage, because you can objectively observe the total communications network, or lack of it, and exert the necessary "friendly persuasion" in the right places and at the right times. Here are a few thoughts which will be helpful in guiding your membership or booster personnel.

Officers are expected to keep open two-way communication to executive management and to chapter membership. These are prime responsibilities. If channels in either direction become misused, the effectiveness of the chapter is threatened.

Naturally, access to top management must be exercised with restraint, but unquestionably the person at the top wants to know what's being planned and accomplished. The officer(s) reporting to them, usually the chapter board chairman and president, will be well advised to keep these visits few and the information "meaty." A beginning of the year statement of objectives and an end of the year report are expected and normally welcomed. Progress reports in between should probably be limited to brief summations, except in extraordinary circumstances.

Communication with the membership itself can never be "a sometime thing." Ideally, contact is daily, with every official in touch with as many members as possible. This is relatively easy to accomplish in a small one-organization chapter but difficult in a community chapter or any organization with hundreds of members. To meet this vital communication need, NMA chapters have developed strong membership committees headed by the membership chairman. In some chapters they are known as the "marketing manager" or "booster chairman."

Their job is to organize for positive communication. They select outgoing, active people as committee members. They're called representatives (or boosters) and they have the responsibility of keeping in contact with several assigned members (usually 10 -12, depending on the chapter size).

Before the start of the chapter year, the chairman calls the committee together for an orientation meeting with officers and other leaders. After initial warm-up and introductions, committee members are made aware of the essential nature of their work.

These may include:

- Securing 100 percent membership of all eligible employees in their assigned group,
- Renewing old memberships, as well as, new contacts,
- Continually "talking up" NMA to their assigned group,
- Serving as a two-way informational pipeline between membership and chapter management, and
- Being aware and urging participation in upcoming chapter, council, and NMA national events.

The initial committee orientation meeting is followed by frequent informal meetings to give the representatives an opportunity to report activities and discuss mutual problems. Officers may use these occasions to deliver informative and inspirational messages. These meetings should be kept short with facts presented in an interesting manner.

Follow-through is implicit in the continuing development of the membership committee. Close attention should be paid to patterns and trends of attendance at meetings with corrective action taken when indicated. Membership renewals are scrutinized and get concerted attention if they lag. Reaction of members to meeting programs should be regularly observed and passed along with recommendations to the appropriate people. The membership committee and its chairman, as well as the officers, must be particularly alert to the reactions and attitudes of the members toward chapter activities and personalities. They should be encouraged to be on the alert for any uncertain feelings or facts and report them to chapter leaders early enough to allow the leaders to take timely action as needed.

As vice president, it is imperative that you keep a close eye on both membership and executive management support. You certainly don't want to spend "your year" building bridges. Rather, you'll want to build on the strengths already established and "cash in" on the good support which you've helped put in place.

The Monthly Meeting

It's true that this activity has been placed in the hands of a president who has been given rather complete authority and responsibility to carry out assignments. Without undermining this authority, or appearing to interfere with the president's plans and committee relationships, the vice president must discreetly keep a close watch on this activity. Many other good achievements in the chapter are forgotten and not appreciated, if the meetings are less than the best. Here are some pointers to help you in counseling program personnel.

Each meeting is planned to achieve a given objective with the year's programs outlined in advance by the program committee. Members of this committee are provided with detailed guides and suggestions. As we touch on these matters, the elements of program planning that chiefly concern us are the types of programs and their presentation.

KEEP IT VARIED

Plan a light speaker to follow a serious one and make sure the audience is made aware of entertainment coming next. Don't settle on the "speaker format" as being the only one possible. Try to arrange panel discussions by employees, executives, or "experts" with differing points of view. Set up lively audience participation exercises. Keep them guessing, "What's next?"

INVOLVE MANAGEMENT

Have an "Executive Management Night" each year, preferably at the installation of new officers. At this event, executive management can offer its own organization progress report, with attention given to profits, forecasts, new product development, and other appropriate information. Community chapters can offer a program of shared reports, with emphasis on benefits to the community.

BE DIFFERENT

Come up with something new and unexpected at each meeting. Look for entertainment possibilities. Offer attendance rewards and unique door prizes. You'll find other chapter leaders to be a good source of successful meeting ideas.

DEVELOP GRASS-ROOTS TALENT

Look for opportunities to get members (other than officers) into the programs. Assign them "spotlight speeches" on serious and light topics. Allow occasional remarks from the floor and make sure the consistent hecklers get their turn in the spotlight. All assignments are given with a reasonable expectation that the members will be able to perform effectively and constructively.

FOOD HELPS

Rising dinner costs can strain a budget, but dinner meetings have proved to be very successful. But, so are breakfast and lunch meetings! Food doesn't have to be deluxe, but it's vital to a meeting's well-being and effectiveness. To paraphrase an ad slogan, "promise them anything, but give them something good to eat." One of the greatest challenges of NMA chapter leaders, still not satisfactorily met, is maintaining high attendance at non-dinner meetings. "Brown bags" are a decent alternative.

How to handle a meeting is as important as what it concerns. Members enjoy interesting and smoothly-conducted meetings, but you can drive them away with meetings that bore and drag. Nobody admires you for wasting his/her time.

START AND FINISH ON TIME

Get a timetable agenda into the hands of every key participant. Use the agenda with discretion and with tact. If one portion is going beyond its allotted minutes, be guided by the audience's enjoyment. If interest is unmistakable, stretch the agenda a little. If the audience is yawning, diplomatically bring it to a quick close and move to the next agenda item.

WATCH THOSE REPORTS

Many a meeting has been blown by long-winded reports. Avoid reading the minutes of the previous meeting as this may serve only to convince members that not much of interest happened. You're better off to get reports and meeting minutes printed up and make them available to all who are involved. If chapter actions must stem from these items, then give the members plenty of time to study them several days or weeks before bringing motions to the floor. It's better to restrict such actions to the annual business meeting.

MAKE ANNOUNCEMENTS LIVELY

Don't let announcements of coming chapter events become routine. Keep them brief, clear, and interesting. Use membership talent to come up with new ways to present the facts. A "Town Crier" with a bell and three cornered hat is a device which one chapter found useful. Special "radio commercials" can be enjoyable as well as memorable. Enthusiasm must flow from the meeting chairman.

MAKE YOUR "PROPS" WORK

A microphone and public address system is helpful for any group of 30 or more. In a large room, hand mikes carried into the audience are recommended during discussion or for questions to the speaker. Of course, whenever a member of the audience participates, encourage him/her to stand. A tabletop podium should be a part of every chapter's meeting room equipment. A final suggestion—a speakers' table with several people sitting at it need not become a locked-in fixture of meetings. Many chapters use this only for occasions when members and guests are to receive special honors.

SHOW YOUR PRINCIPLES

Displayed prominently at every meeting are the American Flag (and the flag of other countries, if international guest(s) are present) and your NMA Banner. Each meeting should begin with a non-denominational invocation (offered by a succession of different guests or members) and the Pledge of Allegiance (optional).

Building Broader Participation

Very often, committee chairmen become preoccupied with the achievement of their tasks and are unaware that they are operating contrary to one of the major purposes of NMA — to provide opportunity for everyone to get into the act. The vice president, being removed from immediate task responsibilities, can watch for trends in this direction and pass on a word of advice to the right people.

Being a member of NMA is not a spectator sport — or at least it shouldn't be. There are several ways that you can get people personally and enthusiastically involved.

GET COMMITTEE COMMITMENTS

Have the membership committee representatives interview each new member and report, in writing, committee preferences. Make sure each is assigned to activities closely allied to his/her strong interests. With each member working on at least one committee, your membership involvement is assured. Don't try to mass produce this result; if the assignment doesn't make sense to the member, he/she can quickly lose all interest in the chapter. Keep in mind that nothing you do as a leader will be any more vital than this close attention given to realistic membership participation — organize, deputize, energize, and supervise.

DEVELOP FUTURE LEADERS HERE AND NOW

Select your committee chairmen with great care. The extrovert who earns favorable attention speaking up at the meetings may or may not be the right individual to head a committee whose work consists largely of making plans. Before making any appointment, go over the alternative assignments with the candidate. Don't do it over the phone. You'll have a better chance of making a good decision about their real interests and personal goals if you have a face-to-face discussion.

When you have most of the chairmen slots filled, make sure that an unsuitable assignment isn't handed out just because nobody else seems to want it. Officers and board members will do well to consult together when it's time to select chairmen. It can be helpful to get input from executive management to make sure that key people have not been overlooked.

Officer Responsibilities

Most chapters have a chairman of the board of directors, a president, at least one vice president, a secretary, and a treasurer. Keep in mind, however, that number and titles of officers, committees, etc., may vary with the specific chapter's size and needs. Officers may be elected by the membership, but a new trend is developing among the larger chapters in which the president is selected by the board of directors. The board chairman is usually elected by members of the board from their own group. The past president sometimes moves into this position automatically. Following is a list of typical functions and responsibilities of NMA chapter officers.

CHAIRMAN OF THE BOARD

As leader of the policy-making group, the chairman occupies a highly responsible position. He/she must have a background of experience in chapter leadership, the ability to be firm and objective, and possess a visible amount of interest and enthusiasm. The chairman will usually:

- Preside at board meetings,
- Direct the board in preparing long-range (3 to 5 years) and immediate (1 year) objectives for the guidance of officers,
- Develop board meeting agendas and transmit to board members, at least five days in advance of board meetings,
- Call meetings of the advisory council (defined in a later section) whenever there is a problem where chapter, organization, or community policy may be involved, and
- Serve as direct liaison between the board of directors and executive management.

PRESIDENT

Here is the center of activity. Ideally, the NMA chapter president should be a person of great enthusiasm and desire, whose boss is willing to allow the necessary freedom to do the job well. He/she should hold a position in the company that will give him/her the freedom to spend time on chapter activities.

The more apparent among the president's many responsibilities is the conducting of monthly meetings. A lackluster job here can detract from overall accomplishments. Much of the president's work requires talent in organization and membership motivation.

The president must learn to delegate duties, while maintaining contact and exercising supervision. As the number one leader in the chapter, the president needs knowledge of chapter history and affairs, as well as administrative experience — neither can be gained overnight.

The logical candidate for the presidency is a person whose background includes service as a committee chair, a conference leader, another chapter officer, or a board member. Many chapters have two or more vice presidents who usually can be expected to advance "through the chairs." This arrangement allows greater flexibility to those selecting or nominating the new president. Automatic progression has led to difficult and sometimes embarrassing problems in some chapters and should be avoided.

The president must develop plans to achieve assigned objectives to:

- Organize and implement necessary arrangements to carry out these plans,
- Direct and coordinate other officers in the realization of objectives,
- Establish and maintain a "chain of command" with clearly understood authorities and responsibilities,
- Preside at monthly membership meetings,
- Acquire a detailed working knowledge of NMA services and other opportunities for the benefit of the chapter,
- Make recommendations to the board, proposing actions to serve the chapter's best interests,
- Observe parliamentary procedures and be cognizant of the constitution and bylaws,

For further information see the President's Guide.

VICE PRESIDENT

From one chapter to another, the prefix title of the vice president may vary. He/she can be called the executive vice president or the first, second, or third vice president. But in every NMA chapter the "VEEP" is almost always Mr. /Ms. Emergency. In the illness or absence of other officers and chairmen, the president often assigns this duty temporarily to the vice president. This "swing shift" operation, of course, helps prepare the vice president for an even busier year as president. The vice president must:

- Be prepared to accept all the responsibilities of the president whenever so requested,
- Serve as "assistant president" — that is, keep informed on everything going on in the chapter, pass this information along to the president, and serve as a sounding board to help make good decisions,
- Coordinate the various committee functions assigned for supervision,
- Get all the necessary experience you can to prepare you for the presidency next year, and
- Arrange an orderly transfer of responsibilities to the new officials at year end.

SECRETARY

The secretary is sometimes saddled with details that should be handled by committee chairmen. Presidents alert to this are careful to keep the secretary concentrating on secretarial functions, not with the activities of individual committees. Even so, the duties of the secretary are many, and some chapters have both a recording and a membership secretary. The secretary must:

- Maintain all chapter records and keep them up-to-date,
- Keep the minutes of board and executive committee meetings,
- Receive and file for future reference detailed reports on courses and activities from committee chairmen,

- Keep attendance records (unless assigned to committees),
- Coordinate scheduling of meetings for all events to avoid conflicts in dates,
- Process membership applications and handle distribution or issuance of pins, certificates, and membership cards,
- Handle all official correspondence,
- Send all monthly reports and application forms to NMA headquarters as explained in the Secretary's Guide (most forms available on NMA's Web Site)
- **Keep NMA headquarters informed** on membership and board meeting dates, changes in officers, committee chairmen, organization executives, election and installation dates, etc.,
- Report to the president before each general meeting—presenting facts about new members and current information on chapter activities,
- Assist the president in preparing the chapter's year-end annual report for the board of directors, giving a copy to the newly elected secretary,
- Send out notices of regular and special meetings,
- Compile and publish calendar of events, and
- Coordinate with the treasurer and other chapter leaders on membership renewal procedures.

TREASURER

A very solid responsibility falls upon the treasurer whose sound judgment and meticulous actions are vital to any chapter. The treasurer's duties are clearly defined. The treasurer must:

- Assume control of the chapter's bank account and have the signature card changed,
- Take over all financial records from the former treasurer,
- Verify the security bonds of all those who handle chapter funds,
- Handle all financial administrative tasks, such as paying bills, collecting dues, etc.,
- Pay by check, all authorized payments and sign with the president all checks written on the chapter's account,
- Study the financial condition of the chapter at the end of each month—noting whether reserves will be sufficient to carry on the chapter's activities for the balance of the fiscal year and advise the president of exceptional conditions,
- Prepare any special financial reports requested by the chapter president or board (these reports would normally concern special events and projects),
- Prepare monthly financial statements for the board, and at the end of the fiscal year, the treasurer's annual report and supply the incoming treasurer with a copy, and
- Submit Form 990 annually to the U.S. Internal Revenue Service.

BOARD OF DIRECTORS

The functions of the board should parallel those of a corporation's board of directors. Collectively, the members observe, plan, counsel, and evaluate the chapter's progress. The board member, in concert with others, must:

- Evaluate proposals by chapter officers and members,
- Create policies necessary for effective operation of the chapter,
- Set long-range policies and short-range objectives,
- Approve total budget for the year as well as major budget items,
- Assist officers and chairmen in leadership development activities,
- Supply guidance to officers,
- Submit proposed constitution amendments and major policy changes to the membership for vote, and
- Serve in many instances as the financial committee, evaluating fund-raising ideas, advising chapter leaders on financial matters, and making sure fiscal policies are not in conflict with overall organization policies.

For further details see the NMA Board Member's and Board Chairman's Guide.

EXECUTIVE ADVISOR (OR ADVISORY COUNCIL)

Whether this function is the responsibility of one person or of a group will vary according to the needs of the individual chapter. Whichever may be the case in your chapter it is a form of liaison which is invaluable. The executive advisor(s) must:

- Advise the board of directors where matters of organization policy or interest may affect decisions of the chapter board or its activities, such as employee relations or corporate policies,
- Coordinate chapter and organization mutual interest and goals, and
- Promote with executive management firm approval an understanding of the NMA chapter and its objectives.

To handle the many responsibilities suggested on these pages, the vice president must be a generalist. Within this generalist role, however, you will usually find that a rather heavy share of your attention must be given to the chapter's committees.

Common Committees

These few pages present an outline of the work of major committees common to every NMA chapter. Larger chapters may have more and larger committees, but this list represents a suggested minimum committee structure for every NMA chapter.

MEMBERSHIP OR BOOSTER COMMITTEE

In recognition of the marketing concept (with emphasis on the needs of the consumer rather than on the wants of the seller) your modern NMA chapter has renamed its membership/booster group as the membership committee.

This committee should attempt to follow the classic marketing formula of trying to get the right product in the right place—at the right time—at the right price. Its product is the NMA chapter, and its purpose is to promote product acceptance. Some of the duties performed by this committee and its representatives are to

- maintain two-way communication with the membership,
- encourage participation in chapter activities,
- recruit all possible members,
- train committee members,
- develop the goodwill of the chapter, the organization, and NMA,
- distribute publications to members, sell tickets, get reservation cards signed, and collect any items or information needed,
- serve as liaison to other committees to provide general membership information, and
- keep records of member contacts, meeting attendance, and personal data on assigned members.

PROFESSIONAL DEVELOPMENT COMMITTEE

The first purpose of your NMA chapter is the development of personal leadership qualities of the members. The professional development committee in a variety of activities should endeavor to enlarge members' understanding of management/leadership development. Recognizing that personal growth is largely self-development, the committee should

- offer a diversity of management/leadership education programs, courses, and speakers,
- build a greater awareness of the formal knowledge and required of today's manager/leader, and
- impart the need for continuous improvement of management/leadership skills, theories, techniques, and management ethics to members.

PROGRAM COMMITTEE

This committee plans and conducts the monthly membership programs on which much of the chapter's success depends. Several subcommittees are responsible for the various aspects of the overall committee's functions. Other committee duties are to:

- Communicate frequently on the progress of program planning to the president and vice president in charge, and
- Organize and supervise meeting facilities, speakers, receptions, and other duties as required.

For further details see the NMA Program Chairman's Guide.

NEW CHAPTER DEVELOPMENT COMMITTEE

Essential to the continued growth of NMA... THE Leadership Development Organization is the work performed by this committee. Its members need to be fully informed about NMA, its principles, and its benefits. Enthusiasm for the organization is a must. Committee members should:

- Develop new chapter prospects in the area,
- Consult their own executive organization management on the prospects and enlist their aid in making initial contact, and
- Coordinate the new chapter recruitment program with your National Director who will keep NMA headquarters informed.

Community chapters are now expected to direct their efforts toward the development of new chapters in their immediate geographical area. Their efforts in expansion will usually be directed toward increasing the number of member organizations, and in the number of members from current supporting organizations.

COMMUNITY SERVICES COMMITTEE

While the NMA chapter primarily concentrates its efforts on self-development, NMA chapters and councils are encouraged to form a Community Services Committee to become a good community citizen. Committee members should:

- Study the community for worthy and needed projects,
- Maintain communication with community administration, social service organizations and schools (acceptance of project requests are made with the approval of the chapter board of directors), and
- To identify community activities consult the Community Services Guide.

PUBLIC RELATIONS COMMITTEE

The practice of public relations has been informally defined as: "Do something good for somebody and arrange to get caught at it."

The chairman of the public relations committee plans to let the good work of the NMA chapter become widely known. To help in this beneficial action, he/she enlists the services of members who are interested in developing their skills in helpful communication. Committee members should:

- Meet with representatives of communications media to maintain and promote good relations,
- Supply advance stories of chapter activities to the media keeping in mind the news value of names and remembering that competing news organizations resent any suggestion of special favors given to one,
- Secure publicity for the chapter's outstanding speakers, and
- Stress to members that each is a PR manager for the chapter, for NMA, for the organization, and for the profession of management and leadership development.

Advance Planning

About six weeks before the beginning of the fiscal year, the treasurer should meet with other chapter officials to determine the probable size of membership and other income sources for the coming year. A note should be sent to the chairmen of all standing committees, special committees, and officers asking them to submit—before a certain date—their plans and estimates of funds they will need. This date will probably coincide with the Step VI chapter leader training meeting. The treasurer should supply all the chairmen and officers with complete information about their committees' expenditures during the preceding year. They should call committee meetings during the Step III planning period to plan tentative goals for consideration at the Step IV meeting where goals are set and funds allocated. The treasurer then collates the requests and presents them to the chapter's board in the form of a budget proposal for the coming year.

Since the board of directors is the chapter's finance committee and final authority for approval of the budget, the president accompanied by key officers presents goals to the board backed up by a plan-of-action. The board approves the budget making adjustments and revisions as needed.

ADJUST BUDGET TO FIT PRIORITIES

With the essential information in hand, the board of directors evaluates all expense items and adjusts them as needed to produce a sound and workable budget. Some questions involved in their decisions should include:

1. Is the budget adequate to allow fulfillment of the board's stated objectives?
2. Does it identify fixed costs and operating expenses?
3. Does it establish priorities with consideration for short-term and long-range objectives?
4. Will it provide an adequate reserve for possible special projects, special committees, and other contingencies?

NOTE: A contingency fund of five (5) percent to ten (10) percent of income is generally recommended to meet emergencies. Such a fund may be less if experience has shown such emergencies to be rare or where income is temporarily so low that it must be used entirely for routine operations. However, if this condition exists, it must be recognized as a significant danger signal.

THE FINAL BUDGET

The ultimate document has essentially three parts. They are:

1. Amount of income expected with details and sources
2. Amount of expenses forecast including relevant details
3. A contingency plan to reduce expenses should income fail to meet forecast.

The board of directors approves the budget and the chapter moves into its operating year with guidelines based on solid experience and informed judgment.

Once the board approves the budget proposal, it has no further financial involvement in chapter finances -- unless the basic budget proves inadequate. The handling of receipts and disbursements is the responsibility of the chapter officers. However, if the approved budget does prove to be inadequate, proposals for change are presented by the officers to the board.

If approved, the process continues as before. If not, negotiations continue until the problems are resolved.

Many times you as vice president find yourself in the position of counselor and coach to some less experienced committee leaders. You often have to try to "put a handle" on the job in a manner in which the leader can relate it to the more familiar tasks of business or industrial management.

In determining your priorities of time and attention to various operations, you may well decide that the budget and financial affairs generally do not need your close attention. While this may be true, you must remain close enough to the problems of finance to represent the interests of your assigned committees if/when finance cuts are needed.

You can't operate a successful chapter unless it has a sound and realistic budget. This is much more than a "guesstimate" of income and expenses. It authorizes expenditures and puts limits on operating costs. Your officers should keep a sharp eye on dollar flow, and must make provisions for securing extra revenue if and when it becomes necessary.

You — A Project Manager

You've been selected for a special responsibility. Perhaps it's new to you and a little disconcerting. Don't worry — you don't have to reinvent the wheel. Use these guidelines in directing your team of leaders to the successful completion of the task.

VISUALIZE

Be strategic. Take time to sit down and think the project through. Try to see the whole picture. Ask yourself these basic questions:

- Do I have any doubts that I can perform this task? If so, what are they?
- Are the project objectives perfectly clear to me and my committee people?
- How many committee members will be needed? (Allow for illness, vacations, business trips, special courses, and possible loss of interest.)
- Is there a firm project completion date? If not, should it have one?
- How much money will it take? Where will I get it?
- Answer these questions and you're off to a good start.

ORGANIZE AND OPTIMIZE

Your good judgment will dictate the size of your committee — not so small that you're overworked but not so large that you lose control.

- Look at each committee member with understanding of his/her strengths and put their best abilities to work.
- Meet with the whole committee, set the objectives before them, and ask for their constructive ideas on what to do and how to do it most effectively.
- Delegate the tasks according to individual interests and aptitudes. Make sure each committee member understands the assignment and willingly accepts the responsibility involved.
- Express your appreciation of the time and talent each person is contributing to the success of the entire project. Be sure your own involvement is on the working level.
- Help organize subcommittees as needed.

SUPERVISE AND REALIZE

Chairmen who overlook the necessity of personal follow-through can cause the failure of even the best planned projects. Remember Murphy's Law: "If anything can go wrong, it will go wrong." Don't assume that everyone has the same information and even interprets the same facts in the same way. Your job is to:

- Make sure that assigned duties are being performed and being done right.
- Be tactful and courteous, but also be unrelenting in your cheerful determination to see this project completed successfully.
- Keep in contact with committee members and make certain that you receive factual reports on progress made.
- Be prepared to take action whenever it becomes necessary -- firmly and fairly. If a person has a job that he or she can't handle for whatever reason, you do the individual a favor when you insist that help be sought.
- On a regular basis, report to officers on the progress of your project. You'll find that an upcoming report due from you will be a strong motivating factor in your own dedication to the task.

SUMMARIZE AND COMMUNICATE

Your work as a project or committee leader can be of immediate, as well as, future benefit to the chapter if you take the final action of communicating the results.

- Oral reports with visual aids are effective, but for long-term effectiveness, these additional steps should be followed:
- Create a scrapbook record of the project, complete with a narrative summary of problems encountered, procedures followed, and results accomplished.
- Detail your recommendations based on this experience for future programs of a similar nature.
- Attach a financial report if appropriate.
- Give recognition by use of individual names and generous praise for the fine work of committee members.
- Keep in mind when writing this or any other report that you are talking to the reader, not to a committee or an audience. Give your report the flavor of reality, integrity, and enthusiasm.

NMA's Big Idea

NMA exists for the greater development of the skills and personal leadership qualities of its members—this is the ultimate purpose of your NMA chapter. It offers members extraordinary opportunities for growth as it challenges and exercises individual talent. It opens minds to new concepts because it is structured to the vigorous exchange of information and points of view. The NMA chapter heightens any member's appreciation of teamwork as a key to organization's success.

Perhaps least recognized as an opportunity for personal development is the opportunity to hold positions of responsibility in the chapter's hierarchy of leadership. Officers get involved in the highly-practical application of their skills in speaking, reading, listening, report writing, and discussion leader techniques. For the chapter leaders these self-development opportunities are accompanied by stimulating involvement with leaders of other chapters and the council.

It is through association that we grow — and the list is endless of organization leaders whose first venture into leadership and responsibility came while moving through the chairs in the NMA chapter. Your growth is the NMA "Big Idea."