



# National and Associate Director Guide



**NMA's NEW**  
**Chapter Leader Training Series**

# National and Associate Director Guide



© NMA... THE Leadership Development Organization

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Reviewed March 2019

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## FORWARD

Congratulations on becoming an NMA Director...and welcome to TEAM NMA! This guidebook has been prepared to get you “up to speed” quickly and to let you know what to expect at your first Board meeting as well as how to begin interfacing with your assigned chapters and councils. With your experience as a chapter leader, or through other leadership roles you have played, you should become a veteran Director fairly fast. You’ll be able to utilize your background as the springboard for leadership at the national level. As an NMA Director, your responsibilities as a leader now take on an even broader dimension. As a director, you have become a vital link between chapter leaders, their members, and the NMA Board of Directors.

You will enjoy your experience as a Director. You have an opportunity to make a substantial contribution to the progress of NMA, to expand your personal leadership horizons, and to make new friends. How much you gain in personal growth and experience is directly related to the contributions you will make.

This booklet is intended to introduce you to your major duties as a Director and/or Associate Director. Throughout this document the term Director applies to both Director and Associate except as noted below.

NOTE: The differences between a Director and an Associate Director are that the Associate does not have to attend the NMA Board Meetings (although you are always welcome to do so), does not have voting rights on the board, and is not eligible to serve on standing or special committees. The term of office for the Associate Director expires on December 31st each year and needs to be renewed annually.

## NMA CODE OF ETHICS

- I will recognize that all individuals inherently desire to practice their occupations to the best of their ability.
- I will assume that all individuals want to do their best.
- I will maintain a broad and balanced outlook and will recognize value in the ideas and opinions of others.
- I will be guided in all my activities by truth, accuracy, fair dealing and good taste.
- I will keep informed on the latest developments in techniques, equipment, and processes.
- I will recommend or initiate methods to increase productivity and efficiency.
- I will support efforts to strengthen the management profession through training and education.
- I will help my associates reach personal and professional fulfillment.
- I will earn and carefully guard my reputation for good moral character and good citizenship.
- I will promote the principles of our Free Enterprise System to others, by highlighting its accomplishments and displaying confidence in its future.
- I will recognize that leadership is a call to service.

## NMA STATEMENT OF PRINCIPLES

***NMA is dedicated to managerial excellence, personal and professional growth, and leadership development. The following principles identify NMA's core beliefs and provide the basis for the NMA's Mission Statement.***

- We believe in the highest standards of personal and organizational integrity and respect for the individual.
- We believe in lifelong learning, continuous improvement, and the development of a workforce capable of sustaining a competitive posture in the global economy.
- We believe management is a creative, dynamic, and essential process enabling people to achieve personal and organizational objectives.
- We believe that managerial responsibility is shared among all individuals at all levels of the organization and that leadership is critical to management success.
- We believe that individuals and organizations have a community and civic responsibility.

## INTRODUCTION

The role of an NMA Director or Associate Director is not only challenging, but it is key to the success of NMA. He or she has an opportunity to make a substantial contribution to the organization, to expand personal leadership horizons, and to make lasting personal and professional friends. How much one gains in personal growth and experience is directly related to the contributions one chooses to make.

There are four words which represent the main responsibilities of an individual who serves as an NMA Director. These words are AID, INTERPRET, COOPERATE and LISTEN.

**AID**...chapter and council 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.

**INTERPRET**...NMA policies, procedures, and new developments in educational materials for executive leadership, officers of assigned chapters, and individual members.

**COOPERATE**...with other Directors/Associate Directors and NMA staff in the development of policy and the formation of new NMA chapters...with councils in their activities...and with chapters and individual members, to promote teamwork and leadership development.

**LISTEN**...to those you serve! The rest is up to you!

## LEADERSHIP

Your job is not merely an honorary position; it is one of providing personal leadership to NMA and to chapters/councils and individual members. Providing this leadership at the chapter/council level is one of the basic reasons for maintaining Directorships. As an individual you must accept leadership responsibility as well as teach it to others.

What you do and say are important, not just to chapters, councils and individual members, but also to companies and organizations. You are in a position of authority and leadership where you can promote NMA.

As NMA prestige continues to grow, its responsibility to American businesses, industries, and organizations grows. Directors must share in this responsibility by becoming more aware of the problems of management and by assuming leadership in finding solutions.

#### DUAL ROLE OF A DIRECTOR

As a Director you fill two roles. First, you are a policy-maker who must consider what is good for NMA. Secondly, you are the representative of the chapters, councils and individual members to which you are assigned. With homework, diligence, and an open-mind, you will be able to make critical decisions when those two roles sometimes conflict!

#### TERM OF OFFICE

Directors volunteer for either a one-year or three-year term by filling out a Director Petition. Director and Associate Director Appointments can be made by the Executive Committee or the Area Chairs and are in effect only for the calendar year appointed (e.g. if a director is appointed to a one year term in March of any given year, that term ends December 31<sup>st</sup> of that same year)

#### DUTIES OF A DIRECTOR

An NMA Director position requires a lot of thought, planning, and hard work. Directors help establish national policy and make vital decisions affecting NMA's well-being. Directors counsel assigned chapters and councils and serve as their liaison with the Board of Directors.

Directors are the vital communication link between NMA and the chapters/councils. Directors have to be well prepared for this role. Directors should have a sound understanding of NMA's objectives, goals, activities, and programs.

The majority of Director responsibilities are outlined below; however, more effective Directors go beyond the stated duties and devise a personal plan of action.

#### RESPONSIBILITY TO THE BOARD OF DIRECTORS

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- Attend board meetings (3 each year, required for Directors and optional for Associate Directors)
- Represent chapter, council or individual member views on board policy decisions
- Counsel chapters or councils on board decisions affecting chapter or council operations
- Be aware and respectful of views of other Directors on the Board and in your Area
- Participate in NMA Chapter Leadership Training
- **Submit a copy of your Director's Monthly Service Report (every month)**
- **Keep an eye and/or ear open for potential new chapter development opportunities.**

#### RESPONSIBILITY TO ASSIGNED STANDING COMMITTEE (NATIONAL DIRECTOR)

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- Serve on two assigned Standing Committees
- Attend each committee meeting and fully participate
- Follow through on committee activities and status updates which may occur between board meetings

#### RESPONSIBILITY TO ASSIGNED CHAPTERS/COUNCILS

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- **Maintain monthly communication with assigned chapters and councils (request to be on assigned chapter correspondence distribution list)**
- **Visit (virtually or literally) each chapter at least once or twice each year**
- Assist chapter leaders in establishing annual goals and objectives (including at least 2 membership drives)
- Keep chapters informed on all NMA programs and services
- Alert chapters to the need for annual renewals (i.e., CEU, Participation in Leadership Speech Contest, Filing of State Tax info, etc.)
- Encourage chapters and councils to participate in NMA awards and recognition program
- Review chapter and NMA with executive advisors or other executives in assigned chapters
- Keep chapter leadership connected to NMA Headquarters and abreast of new programs and services
- Install chapter officers when requested
- Encourage assigned chapters to join an area council if possible
- Participate in and contribute to local council program
- Function with assigned council in same manner as with assigned chapter(s)

#### RESPONSIBILITY TO INDIVIDUAL MEMBERS

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- Establish contact and maintain an avenue of communication with individual (non-chapter) members in your geographic area or as assigned (request individual member roster from NMA)
- Keep individual members information of NMA opportunities and programs
- Serve as a conduit to NMA headquarters



## RESPONSIBILITY TO AREA CHAIR, COMMITTEE CHAIR AND/OR NMA NATIONAL OFFICERS AS APPROPRIATE

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- Keep Area Chair/Committee Chair/NMA Officers informed of important chapter/council activities
- Receive chapter/council assignments from Area Chair/Committee Chair/NMA Officers
- Report each chapter contact to Area Chair on Director's Monthly Service Report
- Advise Area Chair/Committee Chair/NMA Officers of any chapter's special needs or concerns
- Report to Area Chair/Committee Chair/NMA Officers when you are unable to fulfill a commitment

## RESPONSIBILITY TO NMA HEADQUARTERS

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- Keep NMA headquarters informed of activities
- **Submit a copy of your Director's Monthly Service Report (every month)**
- Report any problem areas with assigned chapters to the appropriate headquarters personnel
- Read all communications from headquarters to chapter and council leaders
- Cooperate with staff in conducting NMA Conferences

## ESTIMATED DIRECTOR EXPENSES AND TIME

Directors should plan to attend three Board meetings (including the one on the front end of the Annual Conference each fall) and a Chapter Leader Training Session (CLT) in the spring. Expenses to the Board of Director meetings involve travel and hotel costs as well as some meal costs. CLT's and the Annual Conference expenses include conference registration fees, transportation to the conferences, hotel costs, as well as some meal costs. (Regarding the Board meeting at the Annual Conference, much of that expense (e.g. travel) is absorbed in or combined with Conference expenses.) Board Meetings and conferences are usually scheduled for weekends to minimize time away from the job.

### **For budgetary/planning purposes:**

Hotel costs for the January and July director meetings held in Dayton are approximately \$139 per night plus taxes of 15%. While officers need to plan on staying three nights (Thursday, Friday, and Saturday), the rest of the board usually arrives on Friday and departs on Sunday morning. Don't forget airfare or other transportation and meal costs. A dinner "out" in Dayton is usually planned for Saturday night for any interested members of the board to attend. The CLT registration fee is approximately \$400. In addition to transportation, expect to spend 3 nights in a hotel, again usually Thursday, Friday, and Saturday.

The Annual Conference registration fee is approximately \$795-\$895 plus hotel costs, usually for four nights – Thursday through Monday night.

Room costs for either conference can vary between \$1419 and \$179 plus taxes of approximately 17%. Transportation costs vary, depending on the distance traveled.

Most of the meals are included with the registration fees at the CLT and Annual conference, but not all of them.

The cost of attending chapter/council meetings is small, if not zero (depending on chapter/council practices). Chapter meetings are usually held during lunch or in the evening. Council meetings are almost always held in the evening or on a weekend morning. The reason for having the assigned director attend a chapter meeting would be to install officers, attend a chapter board or membership meeting, or to conduct leadership training. Time away from the job to service a chapter would be about ½ day, depending on the distance traveled.

### **BOARD MEETINGS: WHEN ARE THEY HELD?**

Besides servicing chapters and councils, the Director serves in a policy-making role on the Board. They are intimately involved in the decision-making process that determines the future of NMA.

Board meetings are held three times a year. The Executive Committee and staff select dates for the meetings in January and June or July (usually in Dayton, OH), and the fall meeting is held immediately prior to the Annual Conference, at the location of the Conference.

Sites of the Annual and Chapter Leader Training are selected well in advance. Every effort is made to move them around the country and avoid religious and other holidays.

Notices of the Board meetings, schedule of activities, and a meeting reservation form are emailed to Directors in advance. Always e-mail your reservation forms promptly, even if you are unable to attend, Directors are requested to submit a notice, to [nma@nma1.org](mailto:nma@nma1.org) if they will not be able to attend.

In addition, upon your request, a personal letter from the NMA Executive Director can be sent to your company/organization executive whom you designate to receive an “official notice” of the necessity of your presence at board meetings.

### **THE MECHANICS OF A BOARD MEETING**

The board, committee and area meetings are conducted in a single day, on a Saturday. There are two sessions of the full board along with geographical area meetings and standing committee meetings.

A “typical” board meeting weekend would follow the following flow:

- The five national officers and NMA staff meet on Thursday and/or all day Friday (8:30 AM – 3:45 PM) to review the board meeting agenda, hear progress on current initiatives and action items, as well as conduct Finance and Policy Committee meetings. The Planning Committee, which includes elected officers along with committee and area chairs, meets Friday afternoon to review/update current plans as well as the strategic plan.
- The first session of the full board convenes on Saturday around 8:30 AM to hear reports of the elected officers and NMA Executive Director. A roll call of attendees is taken to establish a quorum

for conducting official business. Pertinent correspondence is read and any new business is accepted. The meeting is then recessed so that standing committee meetings can take place.

- Two committees meet immediately after the first session of the Board of Directors.
- After lunch, the other two standing committees meet. All committees are responsible for preparing minutes of their meetings and reporting pertinent activities to the full board later in the day.
- The second session of the full board reconvenes between 3 and 4 pm to hear reports from the standing committee chairs along with reports from the ICPM representative and the Policy Committee that met during sometime during the day. The meeting is adjourned after all business is conducted.

To conclude the day, all directors are invited to attend a group dinner that is planned at a local restaurant. Depending on need, the “typical” agenda may always be subject to change!

### APPOINT AN ALTERNATE

When a Director is unable to attend a board meeting, an alternate may be appointed to attend with voting privileges. To appoint an alternate, a written notice including the alternate's name must be sent to the NMA Secretary. Last-minute notification should be faxed or emailed to NMA headquarters. An alternate may be an associate director or any member of NMA in good standing other than a current Director or Elected Officer. If you cannot attend an upcoming board meeting, it is strongly recommended that you send an alternate. For chapter members, this is an excellent opportunity to improve understanding of the "national scene" within your own chapter ranks. It might also encourage others to follow in your footsteps by serving on the Board of Directors in the future.

### STANDING COMMITTEE APPOINTMENTS

The NMA Chairman of the Board appoints committee chairs from among the board members, with assistance from the NMA Staff. In advance of an appointment, Directors have an opportunity to express their preference for committee assignment. All Directors serve on two of the four standing committees: Association Services and Development, Community and Communications, Professional Development and Recognition. They are asked for their 1<sup>st</sup> and 2<sup>nd</sup> choices. If possible, each standing committee has a Director from each area, along with a member of the NMA staff who acts in an advisory capacity (but with no voting privileges).

### STANDING COMMITTEE FUNCTIONS

Each standing committee is responsible for a set of actions, policies, plans relative to a functional area of NMA.: Association Services and Development focuses on the growth of the organization; Community and Communications manages NMA’s communication functions and forums and community service activities (e.g. Leadership Speech Contest; Professional Development is charged with assuring that the membership has access to an array of leadership and management development materials, courses, and other development options; and Recognition oversees NMA’s awards and recognitions programs.

In addition, each committee will complete or make:

**Minutes:** Each standing committee prepares minutes of their meeting. Summary reports/meeting highlights are prepared and presented at the conclusion of the Board meeting by the Chair or a designated standing committee member. The full minutes are then sent to NMA headquarters to attach to the official Board of Directors minutes.

**Motions :** As a result of its meeting, a committee may make recommendations and motions at the Board of Directors meeting. Any Director may make a motion from the floor as well. Robert's Rules of Order are followed. Any standing committee action may be reviewed and subsequently altered by either the Executive Committee (composed of the NMA Chairman, Vice Chairman, Treasure, Secretary, Immediate Past Chairman and NMA Executive Director) or the full board. The Board of Directors may also override actions taken by the Executive Committee. This approach streamlines the conduct of business as well as leaving the ultimate authority in the hands of the full Board of Directors.

## QUALIFICATIONS FOR DIRECTORSHIP

### ELIGIBILITY

**Director** – Any chapter or individual member in good standing may volunteer to serve as a Director for either a one or three-year term of office. Anyone representing a chapter will submit a Director Petition which asks for official approval from their chapter as well as approval from the management of their company/organization for the required time to attend meetings and financial support. An individual member simply needs to sign and submit a Director Petition.

**Associate Director** – Any chapter or individual member in good standing may volunteer (or be asked) to serve as an Associate Director. Associate Directors are appointed for a 1-year term by the Area Chair/NMA Officers. They are required to submit monthly director reports for their assigned chapter. However, they are not required to attend board meetings nor do they have a vote on the Board of Directors. They will also, receive ALL Director Correspondence from the Board and NMA Headquarters and may attend Board meetings if they so desire.

### EXPERIENCE

There is no educational requirement, but the Director or Associate should have demonstrated leadership ability. Previous experiences as a chapter or council officer, and participation in community activities definitely are helpful. This experience indicates a desire to be of service to others and aids in carrying out the affairs of the Board of Directors It is highly recommended that volunteers for a position on the NMA Board of Directors possess the following qualifications

- Have served in a chapter or council leadership position
- Have demonstrated basic leadership skills
- Be currently employed in an organization that allows the individual to function in all capacities required of a Director
- Have or be able to obtain approval from executive management, immediate supervision, and

the chapter/council president

- Be able to dedicate equal representation and service to all assigned chapters
- Possess strong communication skills and be willing to speak before NMA groups
- Have the financial support for travel and other expenses

## PERSONAL FACTORS

As a Director, you should be an effective communicator and like to mix with people. Independent judgment and a willingness to accept additional responsibilities are also important factors.

## NOMINATING COMMITTEE

In the late spring or early summer, the board's nominating committee notifies chapters as well as individual members that it's time to consider volunteering for next year's Board of Directors.

## DIRECTOR PETITION

A Director Petition needs to be filled out and signed by the volunteer; if representing a chapter, that includes approval of the person's supervisor and an executive of the volunteer's organization. The petition consists of three parts: (1) certifications/ verifications of the chapter's support (if appropriate), (2) acceptance by the nominee and (3) acceptance and pledge of support by the executive management of the volunteer's company/organization (again, only for chapter representatives). Petitions are available from NMA headquarters as well as online.

For the individual member/director, signing the acceptance part of the petition means NMA can count on you to attend all necessary meetings and cover your own expenses. A Director Appointment Petition must be completed and submitted to NMA headquarters.

## COMPANY/ORGANIZATION ACCEPTANCE

In signing the acceptance part of the petition, the volunteer's company/organization, in a sense, underwrites the term of office. The company/organization agrees to allow the volunteer the necessary time and usually pays all or some expenses incurred in the performance of Director duties. There have been instances where a chapter or council underwrites all or part of the expenses. The company/organization also understands that the Director will be expected to attend three board meetings a year, to visit NMA chapters in the area, and to represent NMA at various meetings.

## APPOINTMENT OF DIRECTORS

When there are unplanned Director vacancies, the Executive Committee or Area Chair can appoint a Director to serve until December 31.

#### APPOINTMENT OF ASSOCIATE DIRECTORS

The Area Chair/NMA Officers may designate an Associate Director to assist in providing support to a specified chapter(s). Associate Directors must possess the minimum qualifications of a Director and must complete an Associate Director Appointment Petition.

#### ASSIGNMENT OF DIRECTORS

Each NMA chapter/council has a Director/Associate Director assigned to represent the chapter/council on the Board of Directors and to serve as an advisor. If a chapter doesn't fund a Director, one will be assigned by the Area Chair/NMA Officers

Every Director is also assigned two NMA Standing Committees. These committees meet at least once during each regular meeting of the Board of Directors. Committee chairs may call special meetings when required. In addition, the Chairman of the Board may appoint Directors to special committees.

#### REPORTING TO THE MEMBERSHIP

Directors should make periodic reports to the general membership of chapters and councils they represent. These brief reports cover the current activities and future plans of NMA.

With more experience as a Director, reports can be devised on such subjects as new developments in the leadership/management field, business trends, a review and promotion of NMA services, and/or general presentations of his/her choosing. Assistance from NMA headquarters in the form of e-blasts and NMA Breaktime provide the Director with topics for conversation and reinforcement. There is also a Director Checklist in the back of the NMA Directory which every Director receives in January.

#### SUPPORT TO CHAPTERS/COUNCILS

NMA chapters and councils that have active programs will keep the Director busy doing such things as installing new officers, presenting national and area awards for outstanding activities, awarding certificates of excellence, honoring past presidents, and presenting NMA's Silver Knight and Gold Knight Awards. Suggested scripts are in the back of this guidebook.

#### INSTALLATION OF OFFICERS

The Director usually conducts the installation of officer ceremony for chapters and/or councils. Officers may be installed as a group or individually, depending on the time and circumstances. There are a

number of suggested scripts included in the back of this guidebook as well as in the small NMA Directory provided to all Directors.

There are number of programs and activities about which a director should continually promote and inform their chapters, councils and individual members:

### PROFESSIONAL DEVELOPMENT PROGRAM

NMA has an extensive professional development program to help NMA chapters meet their human resource and training needs. Special efforts are made by NMA to keep abreast of new trends and methods in management and leadership development. The educational and certification programs and courses provided to NMA chapters are listed on NMA's website at <http://www.nma1.org>.

NMA chapters are offered "Chapter Rewards" (a dues rebate program), based on chapter size, which certain percentages may be applied toward the purchase of NMA copyrighted proprietary educational courses, conferences, as well as some jewelry and award items. The reward is \$2.00 per member based upon membership size as of January 1 each year. Chapters need to request these rewards as they make their purchases.

### CHAPTER AND INDIVIDUAL AWARDS

NMA has an active program of awards for recognition of outstanding chapters/councils and individuals. Some of these awards are traditionally presented at the NMA Annual Conference. Many other awards, however, are presented at local chapter/council meetings and the Director is responsible for making such presentations. Examples of many of these presentations are included in the back of this guidebook.

Details of the NMA Awards Program are explained on the website; further details are provided in the NMA Awards Guide which is also available on NMA's website.

### CHAPTER AND MEMBERSHIP PROMOTION

NMA continuously pursues a program for the formation of new chapters and the promotion of additional members through yearly national membership campaigns.

The formation of a new chapter is usually accomplished through the combined work of Directors, chapter leaders, and NMA staff. Efforts are coordinated by NMA headquarters. Promotional materials, including audio/visual tools, are available for Directors to assist in new chapter promotional activities.

### PURPOSES OF NMA



NMA's purpose is to provide management and leadership development opportunities to help organizations discover, develop, and showcase leadership talent through the chapter-based experience.

## ANSWERS TO SOME QUESTIONS

### WHO IS ELIGIBLE TO JOIN NMA?

According to NMA policy, eligibility requirements are determined by the company/organization and ultimately the chapter. This permits the tailoring of a chapter to fit more closely the needs of the particular environment. NMA chapters are encouraged to be "inclusive" rather than "exclusive" -- emphasizing that nearly everyone manages/leads their time, their projects, etc.; whether or not they manage others falls into the old stereo typical definition of "manager."

### DOES NMA ACCEPT INDIVIDUAL MEMBERSHIPS?

Yes, providing the applicant meets the qualifications. People who have been caught up in downsizing or early retirements are encouraged to become individual members. Application forms are available from NMA headquarters or you may sign up on NMA's website at <http://www.nma1.org>.

### WHAT ARE THE MEMBERSHIP DUES?

Membership dues are \$correct as written a year for those who are members of NMA chapters that affiliated before o January 1, 2009. For chapters affiliating after January 1, 2009, the member dues are \$48 per year. Individual membership dues are \$48 a year. Both types of membership also are subject to an initial registration fee of \$20. Spousal members may join for \$25. The charter fee for chapters who affiliate with NMA is \$150. Anyone who has ever belonged to NMA need not pay a second registration fee, should they drop out and rejoin later, either at the same location or as a member of a different chapter.

### HOW IS THE NMA ORGANIZED?

NMA is a not-for-profit, professional leadership development association. The governing body of NMA is the Board of Directors. An Executive Advisory Committee (EAC) of upper-level executives from affiliated organizations provides advice and counsel. A Leadership Development Advisory Panel comprised of some EAC members as well as senior HRD/Training executives are asked to provide advice on Professional Development matters. They are advisory bodies only. Business can only be conducted by NMA's Board of Directors.

The officers of NMA -Chairman of the Board, Vice Chair, Treasurer and Secretary - are elected by the Board of Directors. These elected officers, the Immediate Past Chairman of the Board and the NMA Executive Director comprise the core group of the Executive Committee.

All NMA policy is determined by the Board of Directors and administered by the paid professional headquarters staff.

### DOES NMA MAINTAIN A HEADQUARTERS?

The NMA headquarters is located in Dayton, Ohio where the organization was founded in 1925 as the National Association of Foremen. The name was changed in 1956. The staff is headed by an Executive Director who reports to the Board of Directors.

#### DOES NMA PUBLISH A NATIONAL PUBLICATION?

The NMA publishes NMA Breaktime, an online publication, which is sent to chapter leaders and Individual Members. The publication is delivered via email to our members or obtained online at <https://nma1.org>. The publication contains articles of current interest from some of the nation's leading writers and highlights current and upcoming events.

#### DOES NMA PROVIDE SPEAKERS?

No it doesn't but, upon request, NMA provides \$200 a year in financial assistance to each chapter in order to help defray the expenses for a professional speaker. This is a part of your Chapter Rewards Program.

#### WHAT AWARDS ARE AVAILABLE FROM NMA FOR PRESENTATION TO CHAPTER/COUNCILS AND INDIVIDUALS?

NMA has awards that include plaques, certificates, and other miscellaneous items. The Awards and Merchandise Brochure is available to assist in your selection.

#### DOES NMA PROMOTE RECOGNITION AND PROFESSIONAL DEVELOPMENT?

NMA has extensive recognition and professional development programs to help NMA chapters meet their human resource and training needs. The NMA Recognition and Awards Program recognizes professional development and community services efforts in the determination of 'points', which count toward the Excellent, Superior, and Outstanding chapter Awards. In addition, there are numerous individual awards that are given at the national, chapter, and council levels that promote recognition of strong leaders with NMA's chapters, companies and communities. There is also a Community Service and a Professional Development Award that a chapter can earn each year for conducting excellent activities.

#### IS THERE AN ANNUAL NMA CONFERENCE?

NMA holds an Annual Conference comprising personal and professional development programs, official business meetings, networking among chapter and council members, and recognition of outstanding achievements. The conference is attended by Directors, Officers, and members of chapters/councils and is held in September or October of each year.

#### WHAT IS AN AREA CHAIR AND WHAT ARE THE DUTIES?

NMA is divided into six geographic areas. An Area Chair, for each area, is elected annually by the Directors in that area. Generally, the duties are to assign Directors to chapters/councils, participate in meetings, hold Area Director meetings, promote NMA, and meet with executive management of sponsoring companies/organizations. The Area Chair is a member of the Board of Directors and the Planning Committee.



### HOW DOES THE NMA STAFF HELP THE CHAPTERS/COUNCILS?

The NMA Staff assists in two ways: Chapter/council service including chapter/council officer development and organizational guidance. Chapter service is the main responsibility of the NMA Director.

### MONTHLY DIRECTOR'S REPORT

Monthly Director's Reports should be submitted by going to the NMA Web Page <https://nma1.org>. These reports should be submitted no later than the 5<sup>th</sup> of the month following the month you are reporting.

### MONTHLY DIRECTOR/ASSOCIATE DIRECTOR CHECKLIST

- Follow-up MONTHLY with Officers/Members of assigned Chapter/Councils
- Submit Director/Associate Director Online Monthly Report by the fifth day of each month
- Serve as Installation Officer for assigned Chapter/Councils
- Encourage Chapter/Council participation in:
  - Speech Contest
  - Local Community Activities
  - Alignment of Chapter Goals with those of the Chapter's Company Goals
  - Annual Leadership Development/Annual Conferences
  - Council Activities
  - NMA Award Programs
  - NMA Member of the Year
  - NMA Executive of the Year
  - NMA Hall of Fame
  - NMA McFeely Award Program
  - NMA Publications Contest
  - NMA Membership Drive Campaign
  - NMA Silver Knight/Gold Knight
- Encourage Chapter/Council to produce Newsletter
- Provide additional feedback to Elected Officers and NMA Staff
- Highlight Issues/Concerns of Chapter/Council to Elected Officers and NMA Staff

- \_\_\_ Attend NMA Board Meeting (required if Director)
- \_\_\_ Recruit Director/Associate Directors
- \_\_\_ Provide leads on potential new chapter development annually
- \_\_\_ Provide Chapter/Council Monthly/Quarterly General Membership Meetings
- \_\_\_ Keep in constant contact with your Area Chair
- \_\_\_ Provide any NMA Correspondence to Chapter/Councils
- \_\_\_ Monitor Your Chapter or Council Membership Report
- \_\_\_ Monitor NMA's Delinquent Report

***Remember!***

We are a resource to those we serve!

Seek advice and counsel from other Directors

Don't attempt to re-invent the wheel if you don't have to.

***Our Greatest Strategy is:***

We are responsible for creating sustained positive change in our chapters, councils, community, and the companies for which we work... not just providing direct service!

## **Appendix of Presentation Templates and NMA Background Information**



## INSTALLATION OF CHAPTER AND COUNCIL OFFICERS

The ceremony for installation of officers in the NMA chapter is a solemn occasion, comparing to inauguration of political leaders, commencement exercises, or the granting of citizenship in a new country. The installing officer is a key figure in creating this solemn atmosphere.

The installation should be conducted by the assigned NMA Director. If not available, it may be done by a past Director, a company executive, Chairman of the chapter Board of Directors, or another chapter official designated by the Board. Upon instructions from the installing officer, the newly elected officers should assemble at the speaker's table, flanking the installation officer, and all facing the membership.

The installing officer should strive for continual improvement of installation techniques by frequent rehearsals and through critical analysis of each installing experience. Many past NMA Directors have reported that their techniques improved and confidence grew with each new exposure and experience.

In this publication, there are four officer installation ceremonies – three for group; one for individual. They are intended to be guides, and they may be combined to suit the preference of the installing officer. The selected procedure should be fully or partly memorized. If this is impossible, the information should be transferred to inconspicuous small cards. The installing officer gains considerable stature in the eyes of the members if no notes are used. Conversely, the effectiveness of the ceremony is lessened if it is obvious that the material is being read. Each year make some changes so that the members do not get bored watching “the same old show”.

One purpose of the installation ceremony is to impress upon the general membership that its elected leaders are assuming a new role carrying considerable responsibility.

Another is to impress upon the officers the dignity and responsibility of their new office.

A third is to give the officers well deserved recognition at the beginning of their term of office for their willingness to take on this responsibility.

Let's add a fourth. If well-done, it gives the installing officer an inner glow of pride as a Director of NMA.

Two basic types of installation ceremonies are described here. The choice is entirely up to you.

Group installation is used most frequently.

Individual installation is used when more time is available.

### INSTALLING OFFICER'S CHECK LIST

The Director has many things to think about in preparation for officer installation, and it's a good idea to arrive early at the meeting place to look it over.

There are a number of factors that have some bearing on your ceremony, and it is well to learn about them as early as possible. Arrive early, and as you explore the room and check the facilities, below are a few questions you might ask yourself. If you can't provide the answers, ask the local chapter leaders, the facilities manager, or anyone you know.



1. Does it appear that proper meeting arrangements have been made for installation? Where will I “line up” the officers? Is the head table strategically located, or is it in my way? If there is no head table, where will the ceremony take place? What adjustments must be made to improve the set-up with least inconvenience to others?
2. How many officers will be installed? In what offices? Where are they seated?
3. What are their names? What is the correct pronunciation? What do they like to be called?
4. What is the effective date on the “takeover”? Should I “discharge” them (the outgoing officers) at this meeting?
5. Don’t forget to thank the outgoing officers. Mention some of their accomplishments in office, particularly those of which they are most proud. Did they win any NMA awards?
6. Are there certificates for new and old officers? Will I award them or will someone else?
7. Is there a gift for the outgoing president? Who will present it?
8. There should be a pin for the new president. Will I award it? Will I pin it on or hand it over?
9. Will I pass the gavel to the new president? Who will provide it?
10. Where do I appear on the program? How much time will I have? Is there a written agenda?
11. What else is on the program or am I it? If so, I should be prepared for some additional remarks.
12. Will company executives be at the meeting? Should they be brought into the act?

No one likes surprises at a time like this, and chapter leaders are no exception. Ask the leaders to meet with you before the meeting. Give them a preview of what to expect and, if time allows, conduct a rehearsal in the same room where the meeting will take place. This will improve not only their performance but yours as well.

## INSTALLATION PLAN 1 – GROUP INSTALLATION

### PRELUDE TO NMA INSTALLATION CEREMONY

(Suggested remarks to use prior to installing new chapter officers.)

#### ASSETS MAKE THINGS POSSIBLE... PEOPLE MAKE THINGS HAPPEN!

In today's complex business world, it's no secret that human resources have become the decisive competitive edge in organizational growth.

People are the ... Source of ideas ... Creators of productivity and improvement ... Innovators of change ... And leaders who motivate others.

The goal of an NMA chapter is to create a structured environment that will foster creativity and enhance productivity.

The primary purpose of NMA...THE Leadership Development Organization is to promote personal and professional growth through education and leadership experiences.

While it is readily accepted that participation in a planned course of study contributes to personal and professional development, often overlooked is the opportunity for professional development provided by active participation in an NMA chapter.

Accepting the responsibilities of chapter leadership requires the individual to meet and accomplish challenges of leadership development not afforded by job responsibilities.

Beginning with participation on a chapter committee and ascending by steps to chapter presidency, council, and national activities, NMA members find themselves in an environment that allows them to use leadership principles ... planning, organizing, motivating, and controlling.

As leaders of an NMA chapter one of your primary goals is to coach your members to help them achieve all they can.

As today's/tonight's installation officer, I'd like to offer a few tips to help.

Lead by example.

When you decide to give that extra effort in the work you do, your members will notice and they'll be more likely to give their all within the chapter.

Consider each of your members as an investment ... after all, that's exactly what they are.

Encourage your members to keep improving their personal and career performance.

Earn people's respect ... not necessarily their friendship.

Play off people's strengths ... help them improve their weaknesses.

Don't dwell on past mistakes, or successes.

When people succeed, they tend to get caught up in the moment... and can get caught off guard. The past is the past, no matter how good or bad it was.

Experts say we live in times of upheaval. What made you last year... may destroy you this year.

Always have a game plan.

Create goals for your chapter and let the members know how they will fit into your plan. When creating goals, don't forget to plan for the unexpected ... Always have a backup plan.

Offer encouragement to your members.

They like to hear that you appreciate their hard work. At other times, a "kick in the pants" may be more appropriate. Once they are back on track, follow up with praise.

As the new officers move forward from this Installation Ceremony, one last reminder: Help your members realize that the team's success is in their best interest. When they take what they have learned from your leadership and put it to work within their company, efficiency, self-value, and performance will increase.

### **Installation Ceremony for New Chapter Officers**

Call the officers to be installed by chapter/council position and ask them to come forward and stand to your right facing the audience.

Installation officer to audience: "These persons have been duly and properly elected to serve as your officers during the coming year. As installation officer, I ask them this important question . . ."

(Turn to new officers.)

Installation officer to new officers: "Do you officers, realizing the responsibilities of leadership that have been placed upon you, pledge to give your time and energy to faithfully serve the (name of chapter/council) and NMA...THE Leadership Development Organization...to uphold the Constitution...and to work toward achievement of your chapter/council's purposes? If so, each of you will answer...I do."

(Officers answer in unison.)

"Will the members please rise?"

(Members rise.)

Installation officer to members: “These officers have expressed a willingness to serve you faithfully and intelligently as your chapter/council officers. Are you, as members of this organization, willing to render loyal service to those you have elected, and to mutually work toward constant improvement and development of your chapter/council and NMA...THE Leadership Development Organization? If so, each of you will answer...I do.”

(Members answer in unison.)

“Working as a team of officers and members, there is no limit to your achievements, no goal which cannot be reached. With confidence that they will serve successfully...that you will work with them...and that all of you together will promote and develop the ideals of your chapter/council and NMA, I now declare these officers duly installed.”

(Shake hands and congratulate each officer. Ask audience to be seated. All officers except the new president then return to their seats.)

Installation officer to new president: “You have accepted the highest office within your organization. Upon you rests the responsibility for conducting the affairs of this organization in a fair and impartial manner. As president, you will be called upon to exercise the highest type of leadership in planning and direction of chapter/council activities. It gives me great pleasure to present you with this President’s pin\* as an emblem of your high office and a symbol of the esteem of your fellow members.”

(Place President’s pin\* on clothing and ask president to step to podium for acceptance remarks.)

\*If President’s pin is not used, present gavel instead.

**INSTALLATION PLAN 2 – DISCHARGE OF OUTGOING OFFICERS, INSTALLATION OF NEW**

Installing Officer: At this time I would like to ask your (year) outgoing chapter officers to please come forward and face our audience.

I speak for the members of this chapter and the entire membership of NMA...THE Leadership Development Organization in expressing sincere appreciation for your efforts during this past year.

You have served well and faithfully, and you have honorably discharged the responsibilities given you.

I, therefore, declare you relieved of your responsibilities, and your offices vacated. Thank you and congratulations on a job well done. (Applause)

(Installing officer calls outgoing president to podium. Others return to their places.)

President, (by name), on behalf of NMA...THE Leadership Development Organization, I would like to extend to you our personal thanks and sincere appreciation for your contribution of outstanding service to \_\_\_\_\_chapter. During your term of office you have provided a new dimension of professional leadership in upholding the proud tradition of NMA.

I trust you will continue to maintain an active interest in our Association, its activities, and its purposes.

Our best wishes to you for happiness and success in the future, and I am honored to present this certificate (and pin) to you for your outstanding service during the past year.

(President returns to his place.)

Now may I ask that this year's officers please come forward.

(The installing officer addresses the officers.)

Do you, as a team of NMA chapter officers, solemnly pledge to lend your full administrative and leadership skills toward the achievement of the purposes of the \_\_\_\_\_chapter?

Officers Answer: We do.

Installing Officer: Do each of you, as individuals, pledge that you will handle the responsibilities of your elected office in a manner so that, at year end, you can say through my efforts, this is an improved organization; it has served its members better than before; and it is well equipped to help its members meet the demands of the future in a changing society?

Officers Answer: I will.

(Installing officer turns to the members.)

Installing Officer: These chapter leaders have pledged to serve vigorously and faithfully. But they cannot and should not do it all alone. This organization derives its strength from the participation of you, its members, and your contributions of energy, interest and fraternal spirit. Therefore, I ask you, the members, “Do you agree to follow the leadership of this team and support their efforts through participation and attendance at chapter events?”

Officers Answer: We do agree.

(Installing officer turns to the president-elect. Others remain in place.)

Installing Officer: Upon you rest the responsibility to lead this chapter on to new achievements in the coming year, a real honor. It is a year that will live in your memory throughout your professional career. I now present you with this gavel/pin as your symbol of authority. Congratulations, \_\_\_\_\_, and best wishes for a successful year. This team of officers is now officially installed as the leaders of the \_\_\_\_\_ chapter for the coming year.

(Shakes hand, and officers return to their seats.)

(If time allows, the installing officer is expected to make some comments. Here is one idea for such remarks.)

Installing Officer: I’d like to offer some reflections on NMA in general, and the \_\_\_\_\_ Chapter in particular, that may help you to see yourselves, officers and members, in a new light.

This chapter is a living example of democracy at work. Whether we are company executives, middle managers, supervisors, or individual contributors, all of us accept the leadership of our elected officers without question. In the NMA chapter we check our titles at the door to the meeting room. In many other countries, it would take a miracle for this to happen.

Tonight we celebrate leadership... at every level of the organization. This chapter is a marvelous “leadership laboratory” that allows this team of officers to hone their skills and practice the many attributes and leadership competencies we embrace.

Thank you for the privilege of being with you this evening.

### INSTALLATION PLAN 3 – GROUP INSTALLATION

(Installing officer addresses the officers)

Installing Officer: You have been formally elected as the new officers of the \_\_\_\_\_ Chapter for the year \_\_\_\_\_.

This is both an honor and a challenge. It is an honor in that the members have expressed their confidence in your ability and desire to serve as officers (and Directors) of this chapter. It is a challenge in that you will now have the responsibility for what may be the most demanding task of your leadership career to date.

Entrusted now to you are duties and responsibilities that must be energetically and creatively performed if this chapter is to live up to its traditions, maintain its high standards of performance, and further improve its favorable reputation in the community and in your organization.

Like every chapter in NMA, you will be faced with such problems as making every dollar count, presenting interesting programs, maintaining communications, building a leadership team, and handling numerous administrative details. But I can also promise you personal growth as you meet and handle these challenges. You will find that the experience gained here will improve your ability to plan, organize, and facilitate control in your daily work, and especially your ability to motivate, guide and communicate with people.

And now, speaking to you as a team, having been elected to your positions of leadership, do you each agree to devote the time and energy to faithfully serve the \_\_\_\_\_ Chapter, to uphold its constitution and to aid fellow officers in achieving chapter objectives?

Officers Answer: We do agree.

(Ask the officers to face the membership.)

(The installing officer addresses the audience.)

Installing Officer: These officers have expressed their willingness to serve you energetically and willingly as your chapter officers.

As NMA members, are you willing to follow these leaders to help them continue the traditions on which this chapter was founded, to render loyal service to those you have elected, and to mutually work toward constant improvement and development? If so, will you indicate such willingness by standing and giving these officers a round of applause?

(Ask members to resume seats.)

(The installing officer addresses the officers again.)

Installing Officer: This team of officers, leaders, and members embarks today on a new year dedicated to achieving new heights in professional development, community and member service. With your support and cooperation, plus the application of the Code of Ethics in your daily work life, this chapter is now ready to take its place among all the other leadership development affiliates. I declare these leaders duly installed as officers of the NMA \_\_\_\_\_ Chapter.

(Congratulate officers.)



## INSTALLATION PLAN 4 – INDIVIDUAL INSTALLATION

(Installing officer calls the new president to the podium.)

Installing Officer: \_\_\_\_\_, you have been duly elected to the highest office in your chapter. As president, you will be called upon to exercise your talents to the utmost during this new year.

Upon you rest the responsibility for conducting the affairs of this organization in a fair and impartial manner and obtaining maximum benefits from your relationship with the guiding body, NMA...THE Leadership Development Organization.

As presiding officer, I remind you that the purpose of all democratic institutions is to help achieve the will of the assembly rather than to restrain it.

Therefore, I now present you with this gavel/pin as your symbol of authority.

(Installing officer calls the new vice president to the podium.)

\_\_\_\_\_, you should view your role as the executive who carries out the directives of the president. Begin now to prepare yourself for the duties of command next year. Although you should be ready at all times to pick up the gavel and assume its authority whenever it becomes necessary.

(Installing officer calls the new secretary to the podium.)

\_\_\_\_\_, your office carries great responsibility for recording all official transactions and keeping your membership informed. Virtually everything that happens in this chapter is recorded by you and flows through your hands and on to the members, the board, fellow officers, the NMA, and the community. You are the chapter message center. You'll find that the sun never sets on your job. The results of your efforts will play an important part in the historical recording of events of this year's administration, including its awards status.

It is my privilege to install you as secretary.

(Installing officer calls the treasurer to the podium.)

\_\_\_\_\_, you must become the business leader, the one who provides financial stability to the organization. Although keeping the books is part of your responsibility, you are also the financial executive who counsels other members of the leadership team on budgetary controls and financial planning.

I now install you as treasurer.

(The installing officer should make some appropriate final remarks to the membership as shown on other pages in this booklet.)

## CHARTER MEETING CHECKLIST AND SAMPLE AGENDA

The Charter Meeting is the official kickoff meeting of the chapter. It commemorates the first day as a chapter within NMA...THE Leadership Development Organization, and is the chapter's first official function. To that end, it is important that the meeting be well coordinated and professionally conducted. This first gathering will set the stage for the first year – make it a good one!

Charter Meeting Planning:

Promote the Charter Meeting

Ensure that the Constitution and Bylaws are completed.

Verify that the Application for Charter has been submitted to NMA headquarters, along with \$150 charter fee.

Arrange for a meeting facility and any meal functions.

Secure meeting needs, such as podiums, sound equipment, visual equipment, etc.

Develop an agenda for the meeting.

Arrange for a professional speaker and/or a key executive to be present at the meeting.

Appoint persons to be responsible for name tags, greeters at the door, handout materials, etc.

Follow through, follow through, and follow through!

Recommended Charter Meeting Agenda

Social Period	30 minutes
Invocation & Pledge	5 minutes
Dinner	55 minutes
Welcome & Introduction of Guest	5 minutes
Presentation of Charter to Organization's Executive	10 minutes
Installation of Officers	5 minutes

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Presentation of Block, Gavel, Podium Banner, & President's Pin	5 minutes
Presentation of Charter to Chapter President	5 minutes
Presentation of Charter Member Certificates (Optional)	10 minutes
Introduction of Keynote Speaker	5 minutes
Keynote Speaker (Optional)	30 minutes
Final Comments (next meeting date, time, location)	5 minutes
ADJOURN	

## NEW CHAPTER CHARTER PRESENTATION

For many years NMA...THE Leadership Development Organization and its members have worked diligently to improve the leadership capabilities of its membership. Without competent men and women in leadership positions, an enterprise will enjoy only limited success, or, worse, it will fail. It is in this area that the NMA offers its greatest services – not only to you as individuals, but to your organization and the community as a whole.

When you become affiliated with NMA, you are granted the privilege of wearing the blue and gold shield that identifies you as a member of a progressive leadership development team. It is a proud symbol of a professional society whose members are dedicated to the development and recognition of personal and professional excellence.

By joining the NMA, you become a part of a national organization consisting of individuals who have as their common interest...or goal...the development and perpetuation of leadership excellence as well as the preservation and promotion of the Free Enterprise System.

The first duty of NMA...THE Leadership Development Organization, through its chapters, is to expand the knowledge and meaning of leadership principles to the point where they can be applied effectively to improve the productivity of others.

No organization survives on technical leadership alone. The one which progresses and grows is the organization with people who have leadership skills – who know how to work with people – and how to motivate. The NMA offers its members numerous professional development programs which assist them in development of their skills.

One of our most important responsibilities as an organization is to draw upon the vast reservoir of leadership knowledge within our membership and the resources of experts in every field to develop programs that will provide our members with the greatest opportunity of keeping pace with the latest leadership techniques.

The increasing awareness and need for professional leadership at all levels is due in large part to our active deeds rather than mere lip service to professional standards. By becoming better leaders and developing greater skills, we can best gain the recognition for leadership which it so rightly deserves.

Your NMA affiliation is a means through which you gain the many advantages of being part of a large professional organization. You grow not only as an individual, but you also have the opportunity to contribute to the welfare of your company, (employer), your chapter, the community and the nation.

As NMA... THE Leadership Development Organization, we are growing in stature, and in professional development services. Our effectiveness as an organization, however, depends upon the enthusiasm and active participation of every NMA member and every NMA chapter, and council.

What does the NMA ask you to do? It is simply this...

Pledge to extend yourself to the limit of your capacity to develop your leadership skills and apply them effectively.

We have a bright future before us, and with hard work and steadfast determination, we can achieve these objectives together.

## A BRIEF HISTORY OF NMA

The roots of NMA began in southwestern Ohio in the dark years following World War I. The national economy had fallen into a slump following the end of military spending and had not yet reached the false prosperity that produced “Black Friday” in 1929. Factories were dark, barn-like buildings where employees worked long hours for low pay... poor working conditions were everywhere, yet any working conditions were considered good working conditions by those lucky enough to have a job!

Businesses were run by technicians-owners-managers, many of whom had little or no grasp of basic management techniques and little notion of the significance of human relations. The prevailing notion was that “management” meant nothing more than the maximum movement of goods for maximum selling price and minimum cost. One outstanding exception was famed inventor and executive Charles F. Kettering who, at the time, operated the Dayton Electric Light Company in Dayton, Ohio. You’ll recognize that name when we say that it eventually became DELCO, affiliated with General Motors.

One day “Boss” Kettering was approached by a young superintendent named Louis Ruthenberg. He had an idea – that “an individual foreman could become a skilled, effective manager of people through his own efforts and on his own time” if only given the opportunity. This was truly a new concept, for the foreman was characterized (rightfully so, most of the time) as a hard-boiled, blunt person who moved his employees by coercion, force, and threat of discharge.

However, Kettering saw the wisdom and the “win-win” for everyone in Ruthenberg’s idea, so he encouraged and supported the young man in his endeavors. The result? The area’s first class in Management was taught at the Dayton YMCA in November of 1919. Louis Ruthenberg was the instructor.

That idea spread like wildfire. These foremen immediately showed that they had a real hunger to become professionals, with the increase in stature and income that accompanied professionals. The period where there was a social stigma to being a foreman was coming to a close. Finally, foremen began to acquire skills as leaders – in addition to the technical requirements of their jobs.

By 1922, this initial band of workers became the Foreman’s Club of Dayton in order to provide “better structure” to the concept of continuing education. At the same time, other independent groups began to spring up elsewhere in Ohio so by 1924, at the National Cash Register Auditorium, representatives from five Ohio Communities created the Ohio Federation of Foremen’s Clubs under the leadership of Thomas Fordham, their first president.

Soon, similar clubs began to spring up in Indiana, Kentucky, and Illinois. On October 8, 1925, 26 industrial supervisors from across the Midwest met, at Dayton’s YMCA, to form the organization that by year’s end would become The National Association of Foremen. Louis Ruthenberg was present and stated, “...that little group has grown, not only into a large, permanent organization of high ideals and remarkable potential, but also into a strong federation of such groups.”

Upon chartering, the Founders agreed with Ruthenberg and stated, "When foremen realize their opportunities, they will, of their own accord, take the necessary steps to measure up to them."

NAF chapters sprung up across the nation in the 1930's. A milestone was reached in 1945 when efforts were made nationally to unionize foremen and remove them from the ranks of management. The result? An unprecedented growth in membership between 1945 and 1950, as foremen reacted in a predictable manner to the potential loss of stature they had worked so hard to build. Top management gave increasing recognition to the professional standing of these valued foremen and promoted a new unity in management from top to bottom.

During the next few years, periodic surveys showed that the increasing effectiveness of the Association's programs, techniques, and general philosophy was attracting members from a broader spectrum of management and supervisory levels. Thus, In 1956/57 the name was changed to The National Management Association. Downtown Dayton was the location of NMA's national headquarters facility. Ground was broken in 1969 for the current NMA Headquarters – dedicated forty years later on July 18, 2009, as The Fritz Hauf Memorial Building.

NMA's early history, however, is not complete as is printed above. Why? Because history shows us that in the 1920's, another organization, "IMC" was also in its infancy, just a few miles away.

Yes, NMA and IMC started about the same time and for all intents and purposes, were doing the same thing. The only MAJOR difference is that IMC was "connected" in various ways over the years with the YMCA while NMA was independent. But the parallels between the organizations are amazing. As leaders were putting the two organizations together in 2002/2003, more than one person was overheard saying, "Wow, I wonder which one had the 'mole' in the other organization?"

Similarly, at the turn of the last century, YMCA's in other parts of the Midwest were also offering courses in what they called "foremanship". Those classes began to turn into "clubs". In June of 1934, five of these met together and decided to form a National Council of Foremen's Clubs. So NCFC was officially chartered on February 15, 1935.

In 1948, the National Council of Foremen's Clubs changed ITS name to the National Council of Industrial Management Clubs Affiliated with the YMCA...or NCIMC. After ten years of struggling with its own identity issue, the National Association of Foremen became The National Management Association in 1956. Over time, IMC concentrated exclusively on community-based, multiple participant chapters while NMA eventually evolved into primarily (but NOT exclusively, at all) single company chapters.

In 1970, the National Council of Industrial Management Clubs restructured completely and renamed itself The International Management Council. In the late 90's the relationship between IMC and the YMCA began to dissolve and IMC became an independent organization, although some chapters were still able to partner, in various ways, with some of their local Y's.

About 2001, NMA and IMC began to look at combining forces and a merger agreement was signed in late 2003 and went into effect January 1, 2004. Today at NMA national meetings, you will see two very visible pieces of IMC "heritage" - the Wilbur McFeely Award has become part of the NMA Recognition Program and is awarded every other year to renowned authors and leaders while the Dot Shorey Auction has become a major fundraiser for the NMA's Leadership Speech Contest Scholarship Program.

In 2005, NMA, while legally remaining The National Management Association, re-branded itself as "NMA...THE Leadership Development Organization" to once again respond to the realities of a changing workforce and a customer base that was focusing on not only management development but leadership development in a global economy.



## NMA FACT SHEET

Founded in 1925 in Dayton, Ohio – National Headquarters still located in Dayton.

Is a non-profit, non-political, professional educational society.

Major emphasis on educational programs to supplement training provided by employers.

Recognizes that an individual's development as a professional manager/leader can be obtained through personal effort, motivation, and participation.

The only national management organization offering a unique chapter concept.

NMA is governed by members of affiliated chapters and the Board of Directors.

Elected Officers are:

Chairman of the Board	Central Area Chair
Vice Chair	Northeast Area Chair
Treasurer	Pacific North Area Chair
Secretary	Pacific South Area Chair
Immediate Past Chair	Southeast Area Chair
	Southwest Area Chair

Appointed positions are:

- Chair, Association Services and Development
- Chair, Community and Communications
- Chair, Professional Development
- Chair, Recognition
- Parliamentarian
- Representative, ICPM Board of Regents

The Board of Directors guides the affairs of NMA and is the policy making body of the NMA.

Directors volunteer to serve in a particular geographic area.

A paid professional staff at NMA headquarters in Dayton, Ohio administers the day-to-day operation of NMA.

Offers proprietary and vendor/partner training programs and courses, both group and self-study.

Offers certificates in management studies and instruction to recognize individual effort and achievement in Professional Development.

Encourages certification for managers through the Institute of Certified Professional Managers (ICPM).

Promotes certification through PMI (the Project Management Institute) and provides opportunities for live virtual classroom and self-study Project Management Professional certification training.

NMA Breaktime popular online newsletter publication.

Combines an Annual Conference with Educational workshops to ensure a rewarding and educational experience for all in attendance.

Conducts Chapter Leadership Training (CLTs) annually to instruct chapter officers in the proper operation of an NMA chapter.

Records and maintains CEU records for all NMA members.

Has created the NMA Educational Foundation, Inc., a 501(c)(3) organization to receive monies from corporations, foundations, and individuals in order to conduct research and development of new training courses and programs along with conducting a Speech Contest and presenting the McFeely Award.

## WHY NMA?

Many corporations of all sizes in the United States consider their chapter to be significant and an integral part of their leadership development program, much the same as in-plant training, college tuition refund, resident seminars and coaching-counseling.

Monthly dinner meetings are standard fare in most chapters, providing opportunities for a large percentage of the team to hear leading authorities express their views on some of the issues facing employees today. A significant factor in the success of many of the more active chapters is the timeliness and freshness of each speaker's message. Textbooks published last month or last year are considered up to date, but they cannot relate today's newspaper headlines to their message. A chapter speaker can do this on the same day, and many of them do!

The chapter's influence does not begin and end with the monthly meeting. Many chapters conduct weekly discussion groups, semi-formal and formal education programs, plant tours, and many play a strong role in community activities.

One company executive recently told us, "Our chapter could be called a 'Leadership Laboratory'. I've personally recommended to several young 'comers' that they play an active role in chapter activities. Where else can they make decisions without adverse effect on company profits?"

Sometimes we get so involved in day-to-day tasks that we get tunnel vision. We not only don't know but we don't care what the rest of the world is thinking about and doing. Even within large plants we often find managers who can recognize a telephone voice but don't know what that person looks like, much less understand his/her thoughts. Whether we talk about business or pleasure, we have much to gain by getting acquainted, breaking bread together, and perhaps exchanging views in the group discussion program schedule for the evening. This point becomes even more significant when we add the advantages and broadening effect of meeting and working together with individuals from other industries represented in the area council or the entire NMA. Local and national events often draw these people together in solving common problems, leading to lasting friendships and the continued sharing of experiences and ideas.

Clearly-defined and well-understood objectives are important to the success of any endeavor. This is perhaps even more true of NMA chapters than of business because the chapter is a voluntary activity and often gets only that time and attention which members feel they can spare. Every NMA chapter is urged to meet certain standards set by the Board of Directors and administered by the Headquarters staff. Recognition is given to those who meet and exceed these standards in the form of a variety of awards. While the NMA can but doesn't insist that every chapter become an Excellent Chapter, it constantly urges them to strive to meet some, and eventually all, of the requirements.

NMA has been in business since 1925 and knows quite well what a good chapter can and should be. Programs are developed for chapter use, employing do-it-yourself techniques, which place them within reach of all chapters, even those without skilled training personnel among their membership.

Perhaps the most significant argument of all for NMA affiliation is that of being a member of a national professional association. Few companies can afford to give continuous support to all of their employees by sponsoring their membership in other professional societies. NMA is broad in foundation and scope, but unique in that it offers opportunity for development and participation by many employees.

NMA members get out of NMA what they put into it because of the do-it-yourself concept upon which it was founded and on which it has been building since 1925.

Affiliation with NMA allows chapter officers to network with a whole variety of other officers from chapters. At local council meetings, in Chapter Leadership Training, and through workshops at the Annual Conference and Educational Forums, members have the opportunity to exchange ideas and share solutions to common problems. They hear success stories and are challenged to offer their fellow members a healthy return for their investment in time and money in the local chapter.

In short, national affiliation keeps our chapters from becoming merely “knife and fork” operations. By participating in the NMA Recognition Program, chapters can meet standards of excellence and set attainable goals to show value added accomplishments to their executive management. The end result is a truly professional chapter.

## INTRODUCTORY REMARKS FOR AN NMA CONFERENCE

Since The National Management Association was founded in 1925, it has had as its primary objective the development of leadership skills. To meet the new and changing needs, many different methods and techniques have been incorporated into our programs. One of the most effective and popular ideas has been the leadership conference such as you are conducting here today.

You might be interested to know that the formats for these conferences are quite similar.

These conferences provide an excellent opportunity to hear experts from varied but pertinent fields, thereby stimulating new thoughts as well as adding to the general store of leadership knowledge. Leadership needs and techniques are not static -- they change and grow to meet new problems caused by our ever-increasing technological advancement. It's important for leaders to improve their skills to meet new demands. One of the resources vital to the continued growth of any industry is that of well-trained men and women. Without competent leaders any enterprise will enjoy only limited success; or worse, it will fail. It is in this area, the development of professionals, that NMA...THE Leadership Development Organization offers its greatest service, not only to you as individual, but to the community, and an employer as a whole. The first duty of NMA through its chapters is to expand the knowledge and meaning of leadership principles to the point at least equal to the technical knowledge a leader possesses.

A supervisor, for example, may know the operation of every machine in his/her department and know all the procedures and paper work requirements, but this knowledge alone will neither unite nor obtain response from that most important resource of any enterprise: the other people of the organization. No matter what position we hold, we still have basic human emotions that must be dealt with. The technically competent supervisor must have the help of others if the objectives of the enterprise are to be carried forward.

I won't attempt to describe the different professional development courses and programs that NMA offers its members to assist them in developing those skills, but I would like to say that our programs are improving in sophistication and effectiveness.

One of our most important responsibilities as an organization is to draw upon the vast reservoir of leadership knowledge within our membership and the resources of outside experts to maintain a steady flow of new programs that will meet ever-changing needs. Our national headquarters acts as a conduit clearinghouse for many problems, which arise in the leadership field and provides answers to these problems.

We are gaining recognition for leadership as a profession. NMA is pleased and proud to have taken the leadership role in organizing Management Week in America. The increasing awareness of the need for professional leadership at all levels is due in a large part to our active deeds rather than mere lip service to professional standards. By becoming better leaders, by developing greater leadership skills, we gain the recognition for leadership which is so richly deserve.

In closing, I would like to extend to you the best wishes from the officers and Directors of NMA...THE Leadership Development Organization. Today's program is excellent, and I know you will all take advantage of this opportunity to develop yourselves professionally and personally.

## PRESENTATION OF THE CM PIN

Thank you for the warm reception. It is always a pleasure to meet with NMA chapter members.

I have a pleasant assignment tonight and that is to present a certificate and pin to an individual who, through experience and education, has achieved the professional designation of Certified Manager.

The Institute of Certified Professional Managers was formed to enhance the status of management as a profession. The Institute was formed at the initiative of the International Management Council and NMA...THE Leadership Development Organization. NMA still provides leadership and support to the Institute.

The program of the Institute was developed to provide recognition for achievements and contributions to the field of professional management.

What kind of people qualify to be Certified Managers? To answer that question I would like to share with you the Institute's Code of Ethics to which a recipient must subscribe:

- I will recognize that management is a call to service with responsibilities to my subordinates, associates, supervisors, employer, community, nation, and world.
- I will be guided in all my activities by truth, accuracy, fair dealings, and good taste.
- I will earn and carefully guard my reputation for good moral character and citizenship.
- I will recognize that, as a leader, my own pattern of work and life will exert more influence on my subordinates than what I say or write.
- I will give the same consideration to the rights and interest of others that I ask for myself.
- I will maintain a broad and balanced outlook and will look for value in the ideas and opinions of others.
- I will regard my role as a manager and leader as an obligation to help subordinates and associates achieve personal and professional fulfillment.
- I will keep informed on the latest developments in the techniques, equipment, and processes associated with the practice of management and the industry in which I am employed.
- I will search for, recommend, and initiate methods to increase productivity and efficiency.
- I will respect the professional competency of my colleagues in the Institute of Certified Professional Managers and will work with them to support and promote the goals and programs of the Institute.
- I will support efforts to strengthen professional management through example, education, training, and a life-long pursuit of excellence.

Our recipient today (this evening) has met stringent requirements in terms of both education and experience just to apply for the CM designation. When his/her credentials have been approved by the Institute, then the individual may sit for the official three part Certified Manager Examination. Once a candidate passes all three parts, the name is submitted to the Board of Regents for official approval and acceptance into the Institute as a Certified Manager.

Ladies and gentlemen, the Institute of Certified Professional Managers under and by virtue of its Articles of Incorporation and Bylaws does confer the designation of Certified Manager in recognition of demonstrated knowledge, skills, experience, and ethics in the practice of management to \_\_\_\_\_.

The recognition is richly deserved. Congratulations to you and please accept my best wishes for your continued and outstanding success as a professional manager.



**GOLD KNIGHT PRESENTATION**

The role of leaders in business and society has changed dramatically over the years. Today, leaders must not only lead an organization to success, but they must also be leaders in community activities – transferring leadership talents from the conference table, to the shop, to town hall and the chapter rostrum, to service activities, community projects, and political programs.

Within this group some leaders display outstanding talents, having acquired a level of competence that represents professionalism at its highest.

NMA...THE Leadership Development Organization created the Gold Knight Award to give special recognition to men and women who have reached this high professional level in their careers, and in their personal lives as well. The Gold Knight is the highest award a council of NMA can award to an individual. It is recognition by all the chapters represented here that the recipient has earned the respect and admiration of his/her peers. It is a unique tribute to the leadership and the respect for others, which our honoree wears with such humility and grace.

To qualify for this award a candidate must be an individual who has deservedly earned a reputation as an outstanding leader. He or she must have motivated other members to pursue the NMA objectives of development of sound ethical leadership, the recognition of leadership as a profession, and the promotion of our free enterprise system. He or she must have taken an active part in activities that contribute to the welfare of the community and be a good citizen in the highest sense of the word.

As shown by a summary of contributions to company, colleagues, community and country, the individual selected for this award by the \_\_\_\_\_ Council has met these qualifications.

(Describe or list his or her accomplishments.)

(If appropriate:) Joining me in presenting our award will be \_\_\_\_\_

It is with great pleasure that I present the Gold Knight of Award to Mr./Mrs./Miss

\_\_\_\_\_.

## SILVER KNIGHT PRESENTATION

In today's complex world of change, e-commerce, global markets, new technology, and dual emphasis on market share and customer value, leading an organization requires a unique set of skills. No company or organization can rest on its laurels, its history, or even its most recent innovation.

Instead, it takes ongoing leadership and direction from a team of professionals with vision and focus. It requires strategic planning and strategic thinking. It mandates a can-do spirit, a commitment to quality, and a laser-sharp ability to see the big picture. It also requires something else... leaders who can keep multiple balls in the air and who can steer a course through uncertainty and change.

You know who these people are. They are peacekeepers, communicators, and coaches. They are special individuals whose dedication is unwavering and they are women and men who attract the best and brightest people to their side. They are ethical and they have earned the respect of their colleagues and peers.

We're here tonight (today) to give special honor to one such individual... a leader among leaders, so recognized by everyone who has worked with him (or her).

The Silver Knight Award is the highest individual award that a NMA chapter can give. The recipient of this high honor has set an admirable example of outstanding leadership. He/she has motivated others through the NMA Code of Ethics and has achieved measurable progress toward NMA objectives which are:

The recognition of leadership as a profession; the strengthening of organizational unity; and the promotion of the free enterprise system. His (her) additional contributions to general community progress are likewise outstanding.

It's a pleasure and a privilege for me to highlight a few of the many achievements of our Silver Knight Award recipient.

(List of accomplishments)...

(If appropriate:) Joining me in presenting the award will be \_\_\_\_\_

Ladies and gentlemen, won't you please join me/us in a tribute to our honored guest this evening, the recipient of the NMA Silver Knight Award, Mr./Mrs./Miss\_\_\_\_\_.

