



PRESIDENTS' TRAINING LIFECYCLE (PTL)

LEAD

**CHAPTER STAFF
CHECKLIST**

CHAPTER MANAGEMENT

- Overview of the MAP and status
- Board meetings – Minutes and details
- PEAK checks – Where your chapter is and where it can be
- Regional subsidies/ grants / awards – Does the chapter staff have everything on file?
- Attendance of members at events; any red flags?
- Updated events calendar – Learning, engagement, MyEO
- Finance audit – Budget, IE sheet, receivables, chapter balance, invoice tally, etc.
- Strategic Alliances – Sponsorships received, receivables, partner details, etc.
- Marcomm – Any quarterly newsletter or emails scheduled, social media marketing
- GSEA – Chapter finals – Status update
- Forum – Trainings history or scheduled trainings, details of chapter Forums and moderator information
- Renewals (global and chapter) – Process details, checklist, action plan
- Other chapter operations (specific to your chapter)

INTERACTION AND ASSISTANCE TO THE BOARD MEMBERS

- Ensure that the incoming board members' names have been updated on EO Network
- Review communication cadence and method of communication with board members
- Check overall support offered on activities and initiatives
- Handover (if any) from board members exiting the board in the coming year
- Check if the staff has any issues or concerns pertaining to board members

POLICIES AND PROCEDURES

- Be sure to refer to local taxation and financial compliance for any documentation required to be on file with the chapter
- All budget and tax-related documents
- Review of any processes set during the year for chapter management

PERSONNEL INFORMATION AND MANAGEMENT

- Review job description and determine if it is still relevant, and if any additional responsibilities need to be added or subtracted; have chapter staff sign that they agree
- Initiate and complete performance evaluation and appraisals process (if any)
- Be sure the information on all chapter-related IDs and passwords have been maintained on file for easy access by board members whenever needed

Notes



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