

Local Chapter Management

Overview

Monthly Meetings

Date
Time
Location
Speaker
Meeting notice
Reminder meeting notice program

State obligations

President

Committee member to Chapter Promotions

Secretary

Committee member to Communications-Bulletin

Responsible for chapter monthly report for central office

Treasurer

Responsible to submit an annual report to State treasurer
of chapter income and expense by July 31st of each year

Education Chairman

Responsible for sending Education Committee-Chapter CPE
Audit - materials needed to qualify the meeting for CPE

Membership Chairman

Responsible for coordinating efforts with the State chairman and
to report new member activity at the local level to the same

Chapter's Cup Award

24 possible points Designate someone to be responsible for timely submitting the CPE Package

13 possible points The secretary should maintain accurate records of members & guest attending each meeting
It is very important for the Chapter to maintain a list of dues paid members and send that list to
the Membership & Chapter Promotions chairman shortly after May 31st of each year

10 possible points Encourage your chapter members to attend the NCSA PAS's, PTI's, Leadership/Comm Day and Convention

3 possible points Designate a contact for the state legislative committee and utilize this person to put together a
"Meet the Candidate Night" or "Legislative Update Night" for one chapter mtg. per year

12 possible points Designate someone to be responsible for timely submitting the Chapter Monthly Report to the central office

12 possible points Try your best not to miss one month of meetings. Have a social, round table discussion (outlined - w/designated moderator)
officers planning meeting, etc... BUT NEVER MISS HAVING A MEETING

26 possible points State membership recruitment is a must - make sure chapter members are available to man State membership booths
at PTI's, NCSU tax schools, EA Exam sites, etc.

3 points possible Designate one month per year to the State society by having the Chapter Promotions chairman or Membership chairman
present their program to your chapter

5 points possible Develop a team of volunteers to help participate in the Statewide Mall Campaign - Free Income Tax Information Day