

## 2010 Local Chapter Planning Guide

This is a comprehensive plan to assist you in your year as Local Chapter President. It will assist you and your governing board to stay on track and complete all tasks required for the completion of the 2010 Annual Report/Chapter Business Plan.

**The Guide is based on a January – December 2010 term of office.**

You may add your specific chapter meetings, projects, start dates and deadlines. Keeping this journal will help you focus on deadlines for your chapter and will alert the state chapter if there is an area your chapter may need assistance in. **We have a treasure in our layers of leadership within the state and want you to depend on all of your state officers for assistance.**

The year is divided into 5 reporting sections. This will replace all other reports previously required. You are to send the appropriate report to your respective District Vice President, preferably via email, on or before the following dates:

SECTION 1- PRESIDENT- January 31<sup>st</sup>

SECTION 2- PRESIDENT - March 31<sup>st</sup>

SECTION 3- PRESIDENT ELECT & PRESIDENT EACH SEND A REPORT- July 15<sup>th</sup>

SECTION 4- PRESIDENT ELECT & PRESIDENT EACH SEND A REPORT - October 31<sup>st</sup>

SECTION 5- PRESIDENT - December 15<sup>th</sup>

The flow of information from this Report should be as follows:

**Local Chapter President & President-Elect** - work together to complete each section and send the Report to your District Vice President by the deadline date. **Note: The December 15<sup>th</sup> report is to be completed by the current LCP (according to the chapter by-laws) and is to be sent to the outgoing and incoming DVP.**

**District Vice President** compiles and sends a report to their area Governor on or before the following dates Jul 25<sup>th</sup>, Nov 10<sup>th</sup>, Dec 25<sup>th</sup>, Feb 10<sup>th</sup> and Apr 10<sup>th</sup> **Note: The Dec 25<sup>th</sup> report is to be completed by the outgoing DVP, sent to the incoming DVP as well as the outgoing and incoming Governor.**

**Governor** compiles and sends a report within 5 days to the State President- also sends a copy to the State Secretary. **Reports are due to State President and State Secretary no later than: Jul 30<sup>th</sup>, Nov 15<sup>th</sup>, Dec 30<sup>th</sup>, Feb 15<sup>th</sup> and Apr 15<sup>th</sup>. Note: the Dec 30<sup>th</sup> report is to be completed by the outgoing Governor and sent to the incoming Governor as well as the State President and State Secretary.**

**State President** will then use these reports to evaluate the state chapter and compile a report to the Regional Vice President. The Chart contains 4 columns. See below for definition of entries in each column:

√ <b>Deadline Date</b>	<b>Task</b>	<b>Tools</b>	<b>Who is responsible</b>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>

(1) Put a check mark here when the task is completed. Deadline for accomplishing the activity. **Some deadlines are set by National**, some you will need to set based on your chapter's schedule. **The section deadlines indicate when you are to submit that section to your District Vice President- Email preferred.**

(2) Activity to take place. Some activities will be finished in a short time period while others will take place over several months. Some activities require documentation to be attached.

(3) Tools available to help accomplish the activity.

(4) Who is responsible for the activity? This does not mean that only the person listed does the work – they may do the work themselves or they may delegate, but they have the responsibility to make sure the activity is accomplished.

#### Definitions

LCP	Local Chapter President	SEC	Secretary
PE	Chapter President-Elect	TRE	Treasurer
VPM	Vice President of Membership	NM	Nominating Committee
CC	Committee Chairman	SCPE	State Chapter President-Elect
SCP	State Chapter President	ALL	All members
DVP	State Chapter District Vice-President	GOV	State Chapter Governors
GB	Chapter Governing Board (Officers, Standing Committee Chairmen and 2 past presidents).		
LPPM	Leadership Policy and Procedure Manual (updated annually)		

<u>National Tools/Resources</u>	<u>Local Tools/Resources</u>
Chapter Briefings – Print and Web Chapter Management Center - Web National Workshops (also at State & Regional) Leadership Academy Leadership Policy and Procedure Manual (LPPM) Media Tool Kit - Web Newsletter Action Kit - Web Annual Report/Business Plan – Print and Web Task is to Ask Action Kit – Print and Web Recruitment and Retention Kit – Print and Web	Budget Minutes Chapter Book By-Laws Standing Rules Chapter Business Plan (based on Annual Report)

SECTION 1	A separate report to be completed by LCP and PE to District Vice President-(email preferred. <b>Due on or before January 31st</b> )										
Deadline	Task	Tools	Who is responsible								
January			2010 LCP	2010 PE	2010 VPM	2010 Tre	2010 Sec	NM	All	2010 CC	
	Announce/Publish All General Meetings/Programs	Local chapter website		X							
Jan 19-23	Attend WCR/FAR conference		X	X	X	X	X	X	X	X	
	First Governing Board Meeting. Prepare your agenda in advance. Review Chapter Business Plan		X	X	X	X	X			X	
	Invoice local affiliates for annual dues ( If not already completed)	Chapter Budget			X	X					
	Make sure you have added all your meetings to the Guide and set deadlines in advance so you are prepared.		X								
	Attend all workshops for leadership Check with DVP and Governor for schedule	DVP / <a href="http://www.wcrfl.com">www.wcrfl.com</a> / <a href="http://www.floridarealtors.org">www.floridarealtors.org</a>		X							
	Verify that all Chapter members have updated their contact information on <a href="http://www.wcr.org">www.wcr.org</a>	<a href="http://www.wcr.org">www.wcr.org</a>	X		X		X				
Jan 1-Mar 31	Continue with membership and retention programs/campaigns	Not Yet Renewed Reports mailed to VPM Feb and Mar	X		X						
	Meet with DVP to plan district forum Select committees- assign tasks	Set up a calendar of dates to meet until forum	X	X							
31-Jan	Send report to DVP		X								
1-Feb	Complete and submit Annual Report for previous year.		X	X	X	X	X				



<b>SECTION 3</b>		A separate Report to be completed by LCP and PE sent to District Vice President- (email preferred) <b>On or before July 15<sup>th</sup></b> .									
Deadline	Task	Tools	Who is responsible								
Apr/May Jun/Jul			LCP	PE	VPM	Tres	Sec		All		
May 10-15	Attend Mid-Year-Washington	<a href="http://www.wcr.org">www.wcr.org</a>	X	X	X	X	X		X		
	Report to membership on Midyear Meeting Education & News	Chapter Newsletter	X	X	X	X	X				
15-Jul	Start working on a Membership Retention Program	<a href="http://www.wcr.org/LPPM">www.wcr.org / LPPM</a>	X	X					X		
15-Jul	Attend District Forum/Do not hold monthly Program this month		X	X	X	X	X		X		
	Evaluate Chapter Business Plan for progress on goals	Business Plan	X	X	X	X	X				
	Review and fill in annual Report	Annual Report	X	X							
15-Jul	Send in progress on Annual report to DVP	<a href="http://www.wcr.org/AnnualReport">www.wcr.org/Annual Report</a>	X	X	X	X	X				
	Register for Leadership academy - get flight, ck chapter budget	Personal invitation		X							
	Contact Local Association for their events & dates to avoid conflicts as you start planning for next year			X							
	Start identifying speakers for 2011 Programs			X							
30-Jul	Register for WCR/FAR state conference - Aug 24-29	<a href="http://www.wcrfl.com">www.wcrfl.com</a>	X	X	X	X	X		X		

SECTION 4	A separate Report to be completed by LCP and PE sent to District Vice President- (email preferred) <b>On or before October 31st</b>											
Deadline	Task	Tools	Who is responsible									
August			2010 LCP	2010 PE	VPM	Tre	Sec	NM	All			
Jul 30 - Aug 1	Attend Leadership Academy	LPPM		X								
	Register for National Conference, designate WCR as primary affiliation Nov 3-8	www.wcr.org	X	X	X	X	X		X			
	Begin working on 2011 budget	Chapter Budget		X		X						
	Start contacting speakers & setting up 2011 programs	LPPM /www.wcr.org		X								
	Review all chapter positions & responsibilities	LPPM / Chapter Book	X	X								
	Begin to identify committee chairs & members for 2011	LPPM / Task is to Ask		X	X							
September												
	Nominating Committee meets to interview & select slate of officers							X				
	Make plans to attend the State Orientation			X								
	Make plans to attend the District Orientation			X	X	X	X		X			
October												
	Nominating to present slate at least 10 days prior to election						X	X				
	Hold elections of new officers (Jul-Sept), then elect new NM all must be Realtors	LPPM		X				X	X			
	Attend State Orientation			X								
	Start committee chair selection	Task is to Ask		X								
	Start planning Governing Board Orientation/Retreat	LPPM, DVP, State Orientation materials		X								
Oct 31	Send slate of officers to National immediately after elections						X					
Oct 31	Send slate to SCPE			X			X					

<b>SECTION 5</b>		A separate report to be completed by LCP and PE to District Vice President-(email preferred) <b>On or before December 15th</b>									
Deadline	Task	Tools	Who is responsible								
November			2010 LCP	2010 PE	VPM	Tre	Sec	NM	All	2011 GB	2011 CC
	Start contacting speakers & setting up 2011 programs			X							
Nov 3-8	Attend National Conference	<a href="http://www.wcr.org">www.wcr.org</a>	X	X	X	X	X		X		
	Incoming GB prepares Business Plan correlates to Annual Report	Annual Report/GB Orientation		X						X	
	Plan for National Recruitment and Retention Campaigns (ends Mar 2011)	PE receives contest info from Nat		X						X	
	Present 2011 Proposed Budget to 2010 Gov Board for approval		X	X	X	X	X				
	Attend District Retreat			X						X	X
	2011 Officer Installation Ceremony (can be Nov or Dec)	LPPM/Current Budget	X	X						X	
December											
31-Dec	Set 2011 Gov brd & Chapter Program dates	LPPM		X							X
	Set 2011 Chapter programs (remember not to conflict with District Forum)			X							X
	Present 2011 Budget to membership for approval			X							
	Finalize membership recruitment/retention programs/campaigns. Schedule New Member Orientations & add to this Guide	Recruitment & Retention Kit		X						X	
	Invoice local affiliates			X		X					
	Send report add list of programs			X							
	Register for Mid Winter 2011 WCR//FAR meetings & State Installation	<a href="http://www.wcrfl.com">www.wcrfl.com</a>		X					X	X	
1-Feb	Complete and submit Annual Report for 2010 year, no later than Feb 1, 2011		X	X	X	X	X	X			