



CORNERSTONE LEAGUE

Chapter Best Practices: Ideas for Meeting Attendance

1. Local CEO buy-in essential.

- a. Invite all CEOs in chapter to attend “manager’s luncheon”.
- b. Share ideas, best practices. Solicit feedback on what everyone would like to see at upcoming chapter meetings.
- c. Settle on when chapter fundraisers will be held, what format will be.
- d. Anyone willing to host a required training session at their CU?
- e. Explore having an annual CEO/vendor luncheon. Many vendors want access to chapters and may become sponsors and bring door prizes. Vendors will jump at the chance to have a meeting with decision makers and not at a general chapter meeting.

2. Programming designed to appeal to all levels of the CU is essential.

- a. ALM, frontline training, member service, required BSA, Robbery trainings.
- b. Know your audience-how many CEOs, front line staff, and directors typically attend?
- c. If a chapter has geographic issues explore “virtual” meetings, such as webinars or Skype. This should not be the norm but once in a while it may be appropriate to do so.

3. Chapter Program – Tips for Increasing Attendance.

- a. Required compliance/regulatory trainings bring in most attendees – promote heavily and most CEOs will see value and send staff.
- b. **Training/program can’t be too long – should be wrapped up by 7:30pm at the latest.**
- c. Send chapter meeting notice out 2 weeks in advance; send follow up notice less than week in advance. Make the notice as descriptive as possible – what speaker will cover, and why local CUs will find value in attending.
- d. Occasionally, bring in an entertaining speaker who doesn’t necessarily address credit union issues – promote as “Not your Ordinary Chapter Meeting” or go to restaurant and promote as “Not your Ordinary Chapter Chicken”.
- e. Settle on schedule for meeting at annual chapter planning session – post calendar on chapter website. Bring calendar along to manager’s luncheon.
- f. Survey CEOs in chapter – what do they want to see for the coming year? Get their buy- in on what programs they would see value in, which topics they would be willing to send staff and/or directors.
- g. Move the meetings – use 4 or 5 locations.
- h. Sell door prizes – vendors will usually donate.
- i. Discount attendance for small CUs 20M or less in assets.
- j. Be consistent in pricing for meetings.

4. Specific Programs that draw attendees.

- a. Required compliance/regulatory training on topics such as BSA, ALM, director duties, financial training for directors.
- b. Advocacy update – legislative and political. This can be conducted on annual basis.
- c. Invite lawmakers to meetings – Congressional Recess is in August. Biennial state session in odd-numbered years – can present PAC check but need to follow rules closely (CSCUL can help with that.)
- d. Entertaining speakers who don't address CU issues. "Face Reader" is example.
- e. Vendor Expo – Houston Chapter hosts very successful one annually
- f. Auctions for ARCUPAC, OCUPAC, & TCCUL PAC – bake sale (Fort Worth Chapter does excellent job).
- g. Business Partner Program – different levels for vendors, entrance to meetings, buy "package".
- h. "United in Reading" program via USO – Parent in service, is recorded reading book for their child; child is given book so they can hear parent's voice.