

8 - Chapter Formation Checklist

This Checklist addresses the specific division of labor during a Chapter startup. Additional checklists and guidance for established Chapters is contained in the [Chapter Manual](#) available in the on-line Leadership Collaborative. This Manual can also be helpful for startup Events, Membership and Sponsorship efforts.

CHAPTER FORMATION TASKS	GLOBAL	LOCAL
Startup		
• Sign letter agreement	X	X
• Provide Startup Kit and Chapter Manual and access to on-line Leadership Collaborative	X	
• Lead monthly conference calls	X	
• Create Chapter web page and, later, logo and website	X	
• Sponsorship: Recruit Launch Sponsors		X
• Membership: Build mailing list of at least 500 names		X
• Membership: Recruit attendees/contacts to become members		X
• Events: Plan first event(s)		X
• Develop launch messaging	X	X
Launch		
• Events: Begin to plan out several months in advance, holding an event at least once every two months		X
• Sponsorship: Develop longer-term sponsorship plan		X
• Membership: Plan for conversion to paid membership (where applicable)		X
• Participate in Leadership Collaborative with other Chapters (see section on Leadership Collaborative for more details)		X
• Perform bookkeeping and provide financials	X	
• Supply sample documents for Governance to include: Chapter By Laws, Sample Committee Charters, Sample Board Member Code of Conduct standards, etc.	X	
• Legal: Formalize board of directors, Form a 501(c)6 entity, File for non-profit status, Create Chapter's governance documents.		X



XPX Startup Kit

<ul style="list-style-type: none"> Financial: Open bank account with credit and/or debit card, Prepare to take over bookkeeping and financials 		X
<ul style="list-style-type: none"> Execute Service and License Agreement 	X	X
Growth		
<ul style="list-style-type: none"> Send net cash to Chapter 	X	
<ul style="list-style-type: none"> Events: Plan out calendar for a full season at a time 		X
<ul style="list-style-type: none"> Sponsorship: Create a membership grid and marketing materials 		X
<ul style="list-style-type: none"> Membership: Begin to focus on membership retention as well as acquisition 		X
<ul style="list-style-type: none"> Contribute and learn from the XPX Leadership Collaborative 		X