



***The National Association of  
Telecommunications Officers  
and Advisors***

## **CHAPTER DEVELOPMENT KIT**

**NATOA  
1800 Diagonal Road  
Suite 495  
Alexandria, VA 22314  
(703) 519-8035  
(703) 519-8036 (FAX)  
WWW.NATOA.ORG**

# NATOA

## CHAPTER DEVELOPMENT KIT

This kit has been developed to aid and assist those who have expressed an interest in establishing a Chapter of the National Association. This kit is an evolving document, and will continue to undergo review and revision. Those who read or use this document are encouraged to share your feedback with us. Comments should be directed to the Executive Director of NATOA, at the address shown on the front cover, or by e-mail to [ed@natoa.org](mailto:ed@natoa.org).

We take this opportunity to thank those who have contributed to the creation of this document and to its current form. Our special thanks goes to Susan Littlefield, a Past President of NATOA, current President of MO-NATOA and long-time member, for her extraordinary efforts at drafting the document and gathering relevant information. A final thanks to the Chapter Presidents, present and past, who have contributed so much to the spirit and substance of NATOA.

© Copyright 2004  
National Association  
of Telecommunications  
Officers and Advisors

CONTENTS:	PAGE
Starting a NATOA Chapter	3
Getting Started ....Questions to Ask	4
Getting Started ... Next Steps	6
Priming the Pump	
State League Affiliations	10
Raising Money for Education and Advocacy	10
Creating a New Chapter from an Existing Base	11
Charging Dues	11
Leveraging Other Chapters & Related Organizations	11
Internal Communications	12
Developing Model Documents	12
Models For Chapters	13
Managing a Non-Profit	15
Chapter Certification	
National Bylaws Requirements	17
Chapter Guidelines	20
Statement of Intent	22
Request for Certification (Form)	23
Individual Chapter Profiles	24
Sample Documents	30
Chapter Web Site Addresses	
Sample Minutes	
Sample Financial Report	
Sample Annual Report	
Sample Simple Budget	

## Starting a NATOA Chapter

---

It's fairly easy to set one up....

several different models are available for use.

It's a bit of work to run....

officers must be willing to take on some coordination tasks.

It's extremely beneficial...

networks you develop are great for information-sharing and local government advocacy in state forums.

What you need.....

- A group of interested people
- A common cause around which to unite and network
- A simple organizational structure
- A small budget for postage, printing and mailing
- A database or mailing list for maintaining contact with members
- A request for certification by national NATOA as a Chapter
- A person(s) willing to take on the initial leadership and organizational duties

## • GETTING STARTED....QUESTIONS TO ASK

---

- Why do you want to do this and what are your personal goals or needs in establishing a chapter?
- How hard do you want to work as the organizers?
- Are there key potential members whose offices could support start-up activities (long-distance calling, faxing, printing, postage) for several months?
- What are other potential members interested in at this time?
  - General information sharing?
  - Response to problematic state legislation?
  - On what grounds are you “selling” the benefits of a chapter?
- How large will your Chapter area be?
  - An entire state?
  - A major metropolitan region?
  - How many potential members do you think you have in your chosen area?
- At what frequency can meetings be held?
  - How far would members have to travel?
  - Would overnight accommodations be necessary?
- Are “day-trips” or “afternoon-trips” possible for a majority of the group?
- Is there a council of governments, a statewide or regional municipal league or county association in your state with which you could also affiliate?
  - Would/could it provide organizational assistance, membership leads, or some ongoing staff support?
  - Would *they* like to have a “telecom technical advisor” resource?
- Are there annual municipal or county conferences in your state that provide opportunities for “co-located” annual chapter meetings or events?
- Do you have a lot of “experts” in your state who are willing to spend one-on-one time with individual members new to telecommunications issues?
- What are your financial needs? For example, do you need major funding for serious state legislative advocacy or just enough to hold local get-togethers?
- Do you have some large jurisdictions in your selected area that will provide support and/or provide leadership on specific on issues?
- What kind of educational opportunities are already available in your state on telecom issues?

- Are general seminars (franchise renewals and transfers, telecom ordinances) needed on an annual basis?
- Could you market such seminars to non-members?
- How many cable or telecom providers operate in your selected area?
  - Are there opportunities to unite because you are all dealing with the same one or two large operators?
- Would a chapter be a good vehicle for “informal” joint approaches to that operator without the need for formal “inter-jurisdiction” agreements?
- Do you have state legislative issues which require an existing network for “action alert” material?
  - Can you establish a broadcast fax or e-mail list?
  - Who is willing to manage the communications process and get the word out?
- Do you want an informal group with a few procedural rules for meetings?
- Do you want a formal group with adopted by-laws and perhaps state registration or incorporation?
- Have you reviewed NATOA’s rules and procedures for Chapters?
  - Is your group willing and able to abide by those rules and procedures?
  - Please refer to the NATOA Bylaws as provided on page 17 and to the NATOA Chapter Guidelines as provided on page 20.
- How important is it to have non-NATOA (national) members as chapter members?
- Do you prefer to simply get together with nearby NATOA members or do you believe that you must attract more people who do not participate (or know about) NATOA?
- How much will potential members pay to support the Chapter?
- Do you want only local government members or would you find industry member participation helpful?
  - Should the industry members be full voting members or non-voting associates?
  - Should they pay more or less than voting members?
- Will you benefit from a governing Board of Directors or can you function best with just three or four Officers?
- How will you develop “new blood” to take over leadership roles in the future?

## GETTING STARTED....NEXT STEPS

---

1. Contact NATOA’s Chapter Liaison. Discuss the concept of Chapter creation and obtain the initial documents you’ll need to file with NATOA headquarters.

2. Create an organizational committee of no more than four or five people. These could become your Incorporators if you go that route.
3. Poll potential members in your area...staff and elected officials are important to create strength and diversity.

Don't forget to look in the two or three most recent national NATOA directories for past and current members. If you plan to ask for help from NATOA headquarters for additional information (such as e-mail addresses in electronic format), such requests must be submitted first to the NATOA Chapter Liaison.

A simple fax or phone survey asking the following questions can be used to poll potential members:

- Are you interested in a non-profit state (regional) network of telecom professionals?
- Are there others in your jurisdiction that would also be interested?
- Would you be willing to pay individual or group dues to support such an organization?
- What dues level would be too high?
- Is your jurisdiction a member of the National League of Cities or its State Chapter?
- Is your jurisdiction a member of the National Association of Counties or its State Chapter?
- What are your three most pressing cable, telecom or right-of-way issues?
- Do you have suggestions for others we should contact?

4. Evaluate the initial strategy or approach. Once you have identified potential members and what kind of financial commitment they are willing to make, you will have some indication of the structure appropriate for your group, and what issues, trends, or selling points will hold the most appeal in a membership campaign.
5. Research the requirements for incorporation. Contact the Secretary of State or look on their website for items such as:

- Incorporation Application
- Registration to Do Business Application
- Federal ID Tax Number Application
- Copy of State's Corporate Rules/ Laws
- Annual filing requirements

You may decide to forego any action on incorporation at first, but you should know the requirements so that you are prepared for action at a later time.

6. Contact several banks and ask about non-profit accounts.
  - Do you need a Tax Number?
  - What are the monthly or per-check fees?
  - What are the minimum required balances and activity?
7. Based on your response to the issues above, the core group should make some preliminary decisions about organizational structure (see the "Profiles" for ideas) and draft proposed key documents:

- Statement of Purpose
- By-Laws (even if you don't incorporate)
- Membership Categories and Dues (i.e. Individual, Agency, Associate, Industry)

How Officers and Directors are elected / appointed  
How money will be handled

These are not items that can be hammered out from scratch in a big group....paralysis results. It is much better to present some concrete proposals, then allow a larger group to provide feedback. *Don't get so hung up on the structure of the organization that you lose sight of its mission.*

8. File the Statement of Intent (see Pg. 22) with NATOA headquarters and request approval for preliminary use of the NATOA name and acronym for use in publication of organizational efforts. Please note that NATOA is a registered trademark and service mark of the national organization. The full name, acronym, or logo may not be used without permission from NATOA.
9. Call a meeting for all potential members at least three weeks in advance to ensure a healthy turnout.
  - Have a sign-in sheet.
  - Distribute a written agenda to discuss the items developed in draft documents referred to above and get feedback.
  - Consider including a “content” section at the meeting to discuss a few cable or telecom issues you have identified as important. This is a great way to let potential members see what chapter membership could do for them.
  - If it looks like you have the makings of a chapter, establish the *Charter* Member list.
  - Take regular or “straw” votes on the documents as presented or discussed.
  - Hold an election of Officers and/or Directors.  
(Those elected could be an initial interim start-up Board or full-term first-year Board.)
10. Using the meeting feedback and *votes*, have the new Directors finalize your purpose, goals, immediate objectives and paperwork, including operating rules or by-laws.
11. Send a report (minutes are acceptable) to the Executive Director at National Headquarters and to the Chapter Liaison on the outcome of the meeting. Include a complete list of all attendees (including names, addresses, phone, fax and e-mail).
12. File the formal Request for Certification (see Pg. 23) with National NATOA Board. Request action at next regularly scheduled meeting of the Board. Upon formal approval by the Board of Directors, the Chapter will be authorized to operate as a Chapter of NATOA, and will be licensed to use the name, acronym and logo for the purpose of advertising the affiliation with the National Association.

You should not proceed until the Board has approved your application. Note: Be sure to copy both the Chapter Liaison and the Executive Director on this request.

Once you are certified by NATOA, complete any necessary state filings after the group has voted on incorporation or name registration. *At a minimum, you will require a tax number to open a bank account.*

13. Consider approaching a State League. You should now be able to talk about the mutual advantages of some kind of affiliation or technical advisor role for your group. It may be effective to present a one-page written affiliation proposal outlining the mutual advantages. Emphasize how many jurisdictions are represented, rather than merely the number of members. This gives the League staff something to

take to their Board of Directors for action.

14. Create a *simple* membership invitation or brochure that clearly states:

- Your statement of purpose
- Each membership category's dues, descriptions and benefits (or limitations)
- A return form which requests: phone, fax and e-mail contact information and basic profile information on the jurisdiction (including cable and telecom providers)
- Indicate where and how payment (if any) can be made

If you are now affiliated with a state league, be sure to mention that in the brochure.

15. Establish an electronic membership database and mailing list... and be sure to create (and update) a broadcast fax or e-mail list *immediately*. You will find you need them much faster than you expected (especially if the legislature is about to convene) and you don't want to lose valuable time setting it up under deadline. Be sure to add two NATOA addresses to your database, one labeled "NATOA Newsletter & Calendar Info" and the other labeled "(state) Chapter File." This allows NATOA headquarters to keep Chapter records up-to-date with a master copy and to put a working copy in the publications copy file so your information can be shared with the membership.

16. Set up two copies of a simple set of financial and organizational books *from the start*. Include by-laws, meeting notices, etc. These might be as simple as one-page ledgers of income and expenditure categories, or a set of minutes in a binder.

17. Open the bank account with the first batch of membership checks and keep the checkbook well annotated and current.

18. Prepare and distribute a simple directory of every member's contact information -

- Jurisdiction name, population, and number of households
- Member's name, address, phone, fax, e-mail, website address
- Cable operator and franchise expiration date
- Telecom providers operating in their jurisdiction
- Nature and amount of cable franchise fees, telco license or gross receipts fees

A directory provides a communications tool that allows members to network and gain immediate benefits.

Consider sending copies of everything you have developed to the State League.

Even if they have not moved forward on affiliation (and *especially* if they have not moved forward), you want them to continue to be aware of your new group and to call on you for advice or assistance.

19. Supporting "National" NATOA – As a new Chapter, you need to be aware of our mutual obligations. NATOA makes a commitment to its chapters through its Chapter Guidelines, as found on Page 20 of this kit. The Chapter is required to reciprocate and to provide support to the National Association in work done on behalf of all members. To this end, there are a number of approaches that may be used.

- Illinois and Missouri members vote to send an annual contribution to the NATOA Legal Defense Fund in proportion to their overall budget and available funds. Illinois is very generous with a \$1,000 - \$1,500 annual gift, while Missouri sends \$200 to \$500, which represents about 20%-

40% of that chapter's annual income.

- Chapters are encouraged to designate a portion of their fee revenue to NATOA's Litigation and Regulation Fund. Chapters may want to require a surcharge on non-NATOA members to fund this payment. This reflects the value provided to those non-National members by virtue of their ability to enjoy the benefits provided by the National association without the affiliation.
- Chapters often provide a portion of their overall dues revenues to the National Association in the form of a contribution for the Regulatory/Legislative Fund, because the work performed through that fund is generally for the benefit of all local governments nation-wide, and is often extended to specific localities in the form of support for FCC filings and court appeals.

## PRIMING THE PUMP...

### Some creative approaches and activities used by existing NATOA Chapters

---

#### State League Affiliations

Missouri approached the Missouri Municipal League “MML” (itself a member the National League of Cities) when the Chapter started, and became both an “affiliate” of the MML and the MML’s “technical advisor” on cable (and later telecom) issues. When then-Chapter President Joe Laposa approached the MML about affiliation, he was quick to point out NATOA’s long and close association with the National League of Cities. NATOA was fostered by and housed in the NLC headquarters, from its 1980 inception until it became a stand-alone organization in 1995, with the support of the NLC. All brochures and literature reference “an affiliate of the Missouri Municipal League and “NATOA.” This gives instant recognition and credibility.

MO-NATOA holds its annual Chapter meeting in conjunction with the MML’s annual “Legislative Conference” in the State Capital. MML Staff attend as liaisons, which generates some real cross-fertilization on issues.

Oregon and Missouri members have served as presenters at Missouri Municipal League and Oregon League of Cities conferences. Missouri has also found national NATOA experts to come to state meetings for travel costs.

While on separate but complementary paths, Minnesota teamed up with the Minnesota League of Cities many years ago to fight onerous state legislation. The team won a 1996 “seat at the table” in crafting statewide PROW rules promulgated by the Minnesota Public Utilities Commission. (However, some State’s Muni Leagues and County Associations are not always on the same page on issues because of different jurisdictional authorities. Be friendly with both, but don’t get caught in the middle.)

#### Raising Money for Education and Advocacy

- Minnesota, California/Nevada, Texas and Illinois Chapters hold a major annual conference (1.5 to 2 days) at a hotel with content covering both background and current issues. They raise significant funds from the conference registration fees.
- The States of California and Nevada Chapter (SCAN) has developed to the extent that it also organizes and sponsors a major annual conference and video awards program, which generates some significant revenue and participation.
- Texas uses the Missouri model for modest operational dues, but many of its members have gone on to create separate specialty groups like TCC-FUI as a vehicle to raise additional funding for state legislation issues.
- Michigan cities have established “Pro-Tec” as a vehicle for participating in state and federal legislative processes. Both TCC-FUI and ProTec are composed mostly of attorneys who address legislation issues while the state NATOA chapters tend to be composed more of the regulators.

- Minnesota has sliding scale “regular” dues, and sliding scale “public policy” dues (not required for membership) that allow members to funnel additional money to legislative efforts. This can be a useful vehicle for local governments that will allow “dues” payments, but not “lobbying” payments in a departmental budget.

## Creating a New Chapter from an Existing Base or Expanding a Chapter

Some Chapters may find themselves with an opportunity to join with another state chapter or expand their existing chapter by including jurisdictions from another state. If one of these opportunities arises, the existing Chapter(s) should file a Statement of Intent with NATOA to indicate their desire to explore this option further. That provides the national office with notice of the proposed changes, and a format for the two entities to conduct further discussions. In the event those discussions evolve into a determination to create a newly combined Chapter on either a multi-state or regional basis, the new Chapter will need to file for formal Certification with NATOA. At such time as the new entity is certified, any previous certification would be extinguished.

## Charging Dues

- Florida and Baltimore-Washington Chapter Members are in their chapter by virtue of being NATOA members. The advantage of the NATOA member model is that it eliminates the need for membership solicitation and much of an organizational structure if you only want to hold periodic meetings to network and share information....you call a meeting at a member’s venue and invite the list.
- Minnesota (MACTA), the oldest NATOA chapter, has a highly formal structure with fairly high annual dues, and pays a part-time Administrative Director to handle day-to-day operations and conference planning. The advantage to this model is the ability to generate operating funds and manpower for large projects and labor-intensive activities within the state or region.
- Illinois and Missouri have modest annual dues that cover items like stationary, postage, printing, faxing, brochures and directories. Revenues from seminars, meetings or conferences provide additional funds for supporting any activities beyond basic operations.

## Leveraging Other Chapters and Related Organizations

- The Texas and Colorado chapters used the Missouri Chapter by-laws to set up a formal group and structure, thus avoiding “reinventing the wheel.”
- Virginia (a newer Chapter) started out with staff support from a State League and is very focused on issues within the state.
- Michigan’s membership brochure uses some NATOA national graphics and creates a visual logo association with National. The brochure is based on an early 1990s NATOA national brochure. (Be sure that you have your certification and approval for use of the logo and name in place before proceeding with this type of brochure.)

## Internal Communications

Most chapters have developed fast written ways to deliver urgent requests or timely news to their members. It is best to set this up before you have a crisis.

Broadcast fax was the model developed 10 years ago (and it played a huge role in NATOA's ability to generate emergency "Action Alerts" to local governments during the 1995-96 progress of the federal Telecommunications Act of 1996). The majority of chapters have now expanded their communications capability to include e-mail, as well as faxes, and it seems to work well. One consideration to keep in mind with email concerns attachments. It is difficult to open a document written in WordPerfect if you only have MS Word. Therefore, it is helpful, when possible, to send documents in both formats and rich text format (rtf) and let your members know that Adobe Acrobat can be downloaded and used for free.

California-Nevada, Missouri, Minnesota and many other Chapters have developed websites of varying size and content. The NATOA website links to all of them. Reviewing the sites is an excellent way to see what others are doing and evaluate different ways of delivering complex or timely information.

Telephone trees are also useful, but more time-consuming and dependent on the caller's ability to summarize and convey information. They are best used as a back up for folks who have questions or need more information after a written piece is faxed or e-mailed.

## Developing "Model Documents"

These models include model PROW ordinances, cell tower zoning language, telecom master plans, cable franchises, telephone taxation approaches, and agreements for wireless information providers.

There is a myth, fostered by industry providers, that a model ordinance or plan could be developed that all could adopt, resulting in less-complicated telecommunications marketplace. Municipal Leagues, under heavy lobbying pressure from industry associations, often struggle to develop language for such "perfect" ordinances. A Chapter can get bogged down in such endeavors.

There is no one model ordinance that works for everyone, even within a single state. Different classes of cities (Charter, Home Rule, Village, Second, Third or Fourth Class, township, and the like) often have different levels of state-delegated authority or control over roads or taxation. Instead of wasting time or money on developing complete ordinances, focus on creating and sharing detailed elements for such documents or outlining those essential components to any ordinance.

For example:

- Cable Franchises—Definitions, gross revenues or gross receipts payment approaches, and audit provisions
- PROW--sample permit application and grant processes, or occupancy conditions; bonds, insurance and indemnification; audit provisions and reporting requirements; and technical standards for conduit installations

However, draft boilerplate "plans" such as the one developed in Illinois in 1995 for "Telecom Planning Approaches" can be helpful.

## MODELS FOR CHAPTERS

---

### “Oregon” Model

*Similar Chapters:*      *Indiana Massachusetts Hawaii*  
*Wisconsin      Baltimore-Wash*  
*Carolinas*

- Dues-paying national NATOA Members in your state or region are automatically members of the Chapter. No additional dues are charged for Chapter Membership
- Chapter is not incorporated, and does not have a Board of Directors. President is only officer and often serves on a volunteer basis until someone else is willing.
- Usually does not have operating budget, but may sponsor periodic seminars or educational events. Monthly meetings or quarterly are held at a member’s venue on a rotating hospitality basis. Modest operating needs (meeting notices, etc) are supported by a President’s or Member’s employer
- If not formally affiliated with a State League, informal cooperative relationships have been established.

### “Missouri-Illinois” Model

*Similar Chapters :*      *Washington      Texas      Florida*  
*Colorado      California-Nevada*

- Chapter Members pay modest annual membership dues in the \$20 to \$60 range.
- Chapter members do not have to be members of national NATOA
- Chapter is incorporated, with bylaws and elected Board of Directors and officers.
- Operating budget comes from dues and fees for an annual conference or seminar, which may be simple and inexpensive, or formal and more expensive, but are usually held at a hotel in conjunction with Annual Business meeting. Some may institute other projects such as programming awards, which provides operating support for Chapter activities.
- Sends contributions for the national Legislative/Regulatory Fund.
- Chapter has often established formal affiliation or cooperative arrangement with a State League (Municipal or County)

### “Minnesota” Model

*Similar Chapters:*      *Michigan      Virginia*

- Chapter Members pay more substantial annual membership dues....\$100 and up range
- Chapter members do not have to be members of national NATOA, although the President of the Chapter must be a current and paid member. Roughly 50% of Chapter members may be non-national

- Chapter is incorporated, has adopted bylaws, and has elected Board and officers.
- Chapter holds more frequent meetings, sponsors major annual multi-day seminar on cable/telecom issues
- Operating budget from dues and fees may be substantial enough to have part-time paid professional support staff or some staff support through a state league, rather than only volunteer administration by the Officers.
- Has formal or informal active and cooperative relationship with State League on local government telecom issues.

## WHICH MODEL IS RIGHT FOR YOU?

- NATOA does not recommend or endorse one model over another.
- It's best to use only the components that work for you. Mixing and matching will allow you to customize a structure that makes sense in your area.
- There is no perfect model. What works for your group is totally dependent on the circumstances of local authority within a state, the size of your geographic area, the number of willing participants, the initial and immediate activities or needs which demand attention, and the energy or time you have to give.
- Structuring a chapter with a certain amount of built-in flexibility to switch from one style to another as your needs change will provide for long-term stability and appropriate growth in light of new developments.
- Generally, a Chapter would be wise to start out fairly simply. You may want to create a mission statement that establishes the focus and provides guidance, and to elect a few officers. Formal by-laws, incorporation and a full Board of Directors can come later.

If you plan to open a bank account, you probably will need to complete a name registration and acquire a federal ID (tax) number because many banks will not open an account without one.

# MANAGING A NON-PROFIT

---

## Financial Records

Financial records do not have to be complicated, but starting out with a simple ledger sheet and a good set of books is enormously important.

If you want to incorporate or file for tax-exempt status at a later date, you may have to provide financial evidence that you really are non-profit or public benefit or whatever your state calls it.

NATOA will require you to submit a simple financial statement as part of your original certification and annual reports thereafter.

Your members will better understand the need for money if you have a simple report showing what you took in, what you spent, and how much you need to budget for critical future activities, or even postage. While some non-profits basically do financial reports that mimic the checkbook, it is very helpful and more accurate to include a listing of “Accounts Receivable” (money people REALLY owe you, not just that you hope to get) and “Accounts Payable” (bills you have incurred or received but not yet paid).

Keep separate records for any “special funds.”

## Minutes

You simply must keep them. Your Secretary should invest in at least TWO three-ring binders and plastic sheet protectors. Pass one copy along to a new Secretary or President to preserve institutional memory and remain consistent as to form. Basic minutes include

- Place, time and date, and who called the meeting to order.
- How meeting was conducted - conference call, in-person, etc
- What type of meeting it is (regular, monthly, quarterly, special, annual business, etc)?
- List of those attending with titles (President, Directors, Members, Guests, Observers)
- Whether a quorum was or was not present.
- Whether you approved minutes of any previous meeting
- Financial Reports presented or adopted
- Brief description of what type of actions were taken or issues discussed.
  - Elections
  - Committee or Officer’s Reports (if written, then attach to the minutes)
  - Old Business
  - New Business

While it is advisable to keep minutes somewhat brief (and summarizing discussion is an art form) any resolutions you make should be recorded in-full along with the vote. This is very important, but is often overlooked. The resolutions should be formatted to appear prominently (indent, label with “RESOLVED” in bold, or some other visible technique), so that they are easy to find when sifting through years worth of minutes. Minutes should have date and submission signature block and a place to note what date they were approved.

Any written platforms, bylaws, documents, position papers, policies, etc. that are adopted should be attached to (rather than put in the body of) the minutes and referenced. Be sure to mark the attachment as “adopted by resolution of the \_\_\_\_\_ on (date),” so you can recall later which version was adopted when. (See the sample document attached as an Exhibit.)

## CHAPTER CERTIFICATION

---

To be a NATOA Chapter, certain initial and ongoing conditions must be met.

1. Chapters must comply with NATOA bylaws requirements.
2. Groups forming a NATOA Chapter must file a Statement of Intent with National and obtain permission to use the NATOA name, acronym and/or logo for organizational purposes.
3. Chapters must apply to the NATOA Board of Directors for formal certification.
4. The Board, without limitation, is authorized to set conditions or requirements for Chapters. Such conditions may be by resolution, adoption of a certification application, administrative policy or otherwise.
5. The Board may require whatever application form or documents it deems necessary.
6. Continuance of certification may depend upon continued compliance with requirements and timely filing of reports or documents or lists.
7. Certifications may be denied, suspended or revoked by the Board.
8. Groups that have not been certified may not use the NATOA name or acronym in any literature, publicity, organizational filings or documents, nor represent itself as a Chapter of national until and only while certified.
9. NATOA wants to cooperatively publicize chapter events and activities, send national conference and seminar brochures to chapter members, and develop chapter members into NATOA national members. Chapters must support National in these efforts.

### National Bylaws Requirements

#### Article XIII CHAPTERS

##### Section 1. Chapter Organization/Requirements

- A. Within these bylaws, the word “chapter” shall mean “state and/or regional chapter” unless otherwise specified.
- B. The Board shall have the authority to approve the establishment of chapters to further the goals of the Association. The business and activities of these chapters shall be conducted within the guidelines and policies of the Association. All chapters must be approved (including but not limited to chapter Bylaws and dues structures, if any) by the Board for authority to operate as a Chapter of the Association.
- C. Membership and voting requirements for chapters shall be determined by the chapter membership.
- D. In general, the NATOA board encourages chapters to allow membership privileges to any individual who meets one of the six membership categories listed in Article III, Section 1. of these Bylaws. Chapter members do not have to be members of the National Association, however the Chapter President or Chairperson shall be a member of the National Association.
- D. Chapters shall have the authority to conduct chapter activities and to assess a reasonable dues structure to support chapter activities. However, no NATOA chapter shall engage in any activities that are for pecuniary gain or profit to the members or leadership thereof, or are otherwise inconsistent with the provisions of the Internal Revenue Code of the United States, section 501(c) 4 or applicable law. Chapters shall provide an annual written report on chapter activities to the chair of the State and Regional Chapters Committee, or to the President of the Association prior to each meeting of the Association.

ARTICLE III MEMBERSHIP  
Section 1. Membership, Generally

Membership in NATOA, with associated privileges, is open to those who qualify under the membership categories set forth in these Bylaws, and whose dues payments to NATOA are current, where applicable.

A complete copy of the most recent version of the NATOA bylaws is available on NATOA's website. It is the Chapter President's responsibility to ensure that the Chapter has a complete and current copy of any future revised Bylaws, so that the Chapter remains aware of any current requirements, conditions or definitions.

### Annual Filings with National

Two copies of each of the following documents are required. Address one to: [Chapter NAME] Chapter File Address and the other to: [CHAPTER NAME) Working Copy. Mail both to the following address:

NATOA  
1800 Diagonal Road  
Suite 495  
Alexandria, VA 22314

1. Two copies of bylaws if amended during the year.
2. List of New Officers and Directors with contact information
3. Two copies of all membership brochures, general correspondence or solicitations.
4. Two copies of membership list, filed once annually
5. Two copies of all newsletters, Action Alerts, seminar brochures sent as they are published
6. Two copies of Notices of Annual meetings
7. Two copies of Financial Report
8. Two copies of Annual Written Report to Chapter Liaison/Board President on annual activities of the Chapter.

## NATOA STATE AND/OR REGIONAL CHAPTER GUIDELINES

Each NATOA Chapter will establish minimum Chapter guidelines that will achieve the following:

- Establishment and administration of a system for sharing of information about cable and telecommunications issues and activities that impact local government;
- Education and training; to enhance the capacity of members to deal with cable and telecommunications issues; to improve the administration of cable television and telecommunications franchises and the use of such services by local government;
- Technical and informational assistance to the membership;
- Providing a forum for open and balanced discussion and debate of communications issues;
- Communication with other professional organizations for the overall improvement of communications services to the public;
- Whatever other services may be determined by the membership.

### CHAPTER ORGANIZATION

Application to establish a Chapter must be received by the NATOA Board. The application will be reviewed for completeness by the Executive Director and scheduled for a vote by the National Board. A complete application shall include proposed Chapter Bylaws, dues structures, if any, a commitment to comply with the guidelines and policies of the National Association, and other material as may be necessary to define the Chapter's functions and responsibilities. Upon approval of the Chapter application, the National Board shall enter into a memorandum of understanding that shall set forth the roles and responsibilities of the Chapter and the National Association. Such Charter shall bind the Chapter and the National Association to joint commitments as defined by the Board and the National Bylaws ("Article XII; Chapters").

### MEMBERSHIP

Each Chapter may establish classes of membership. Membership in a Chapter, with associated privileges, is open to those that qualify under the membership classes set forth, by the Chapter, and whose dues payments to the Chapter are current, where applicable. The NATOA Board encourages Chapters to allow membership privileges to any individual who meets one of the six membership categories listed in Article III, Section 1, the National Bylaws of NATOA as may be amended. At a minimum, the Chapter President or Chairperson shall be a member of the National Association.

The national headquarters shall receive any Chapter NATOA newsletter publications, a complete list of Chapter members updated annually, and special mailings. The NATOA Board encourages each Chapter to ensure that all members of National NATOA are eligible for the same reduced registration fees for participation in any Chapter conference or training activity as are the Chapter members. More comprehensive membership privileges may be established by the Chapter.

### DUES

Each Chapter may establish membership dues. Rates for dues established by Chapters will be sent to the members once a year. A Dues Schedule will be submitted to the National Association on an annual basis.

### OFFICERS

Chapters may establish categories of officers and may have in place a mechanism for qualifications, elections, vacancies, terms, removal, voting rights and duties.

### MEETINGS

Chapters will conduct regular meetings at times and locations designated by the Chapter. At least one regular meeting shall be held each fiscal year.

## NATOA NATIONAL ASSOCIATION COMMITMENT TO THE CHAPTER

The NATOA National Association ("Association") pledges to respond to all reasonable Chapter needs on a timely basis.

The Association pledges to provide each Chapter with the following:

- Permission to use the NATOA name, acronym and logo in a fashion not inconsistent with the National Association's ownership and use.
- Membership lists, including new member updates
- Information newsletters and special mailings
- Notice of NATOA conferences and educational seminars
- Material and/or information necessary to promote Chapter growth and development
- Availability to technologies, as they become available, that would enable Chapters to passively access our organizational resources
- Summary and/or information on the Association's position on key filings, court cases and legislation
- Copy of the Association's Annual Financial Statement and/or Annual Report

Statement of Intent

This document is for use by those who desire to form a NATOA chapter. The name National Association of Telecommunications Officers and Advisors, its acronym "NATOA" and its logo are registered trademarks and service marks of the National Association and may not be used without permission. Prior to contacting others for the purpose of establishing a chapter and using the National Association's name, acronym or logo, such group must file this "Statement of Intent" with the NATOA Board and receive permission to proceed. The "Statement of Intent" should be sent to the attention of both the Executive Director of the National Association and to the Chapter Liaison for the Board of Directors.

The individuals listed below hereby petition the Board of Directors of NATOA for permission to use the name, acronym and logo of the National Association in their efforts to establish a NATOA chapter. It is agreed and understood that such use is for the limited purpose of establishing a NATOA Chapter, and is subject to subsequent abandonment or success of the effort. The individuals listed below acknowledge and agree that they will be granted limited permission for such use for a period not to exceed 180 days from the date of grant. If, after 180 days, the efforts of the group to establish a chapter have been successful, the group will file a Request for Certification with the National office. If such efforts have not been successful, the group will either discontinue the use, or will petition the National Board for additional time during which to pursue this effort.

Any questions relating to permissible use are to be addressed to the Executive Director of the National Association and to the Chapter Liaison for the Board of Directors.

Acknowledged and Agreed:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Contact Information:

Contact Information:

Address:

Address:

Phone:

Phone:

Fax:

Fax:

E-Mail:

E-Mail:

Employer:

Employer:

Address (if different from above)

Address: (if different from above)

REQUEST FOR CERTIFICATION

State/Region \_\_\_\_\_ Date: \_\_\_\_\_

Business Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Proposed Chapter Name: \_\_\_\_\_ Acronym: \_\_\_\_\_

Organizing Individuals:

Name/Title/Address/Phone/Fax/E-Mail

Date of First Organization Meeting \_\_\_\_\_ Number in Attendance \_\_\_\_\_

Chapter Bylaws in place? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, attach a copy for review.

Does your organization have "not-for-profit" corporate or association status? \_\_\_\_\_

Is your organization incorporated? \_\_\_\_\_ If yes, attach Articles of Incorporation.

Have you obtained not for profit status? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, provide documents.

Have you obtained a Federal ID number? \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, provide \_\_\_\_\_

Please list your elected officers:

President:

Secretary:

Treasurer:

Other (please specify):

On a separate document, please provide the names, addresses, phone, fax, e-mail and affiliation of all officers.

Have you established a membership structure? If yes, please respond to the following:

Is membership in National NATOA a condition of Chapter membership? \_\_\_\_\_

If an individual within your state/region is a National NATOA member are they automatically considered a Chapter member? \_\_\_\_\_

Please describe your membership categories: \_\_\_\_\_

Have you established a dues structure? If yes, please respond to the following:

Annual dues required? \_\_\_\_\_

Does the dues amount for National NATOA members differ from others? \_\_\_\_\_

What are the dues categories and amounts? \_\_\_\_\_

As a separate document, please list the names, addresses, phone, fax and e-mail of all members as of this applications date.

How often will the officers of the organization meet? \_\_\_\_\_

How often will the membership of the organization meet? \_\_\_\_\_

Have you adopted a mission statement? \_\_\_\_\_ If yes, please attach.

Have you planned your first event? \_\_\_\_\_ If yes, please provide details.

Are you affiliated with any state or municipal leagues? \_\_\_\_\_ If yes, please provide details.

As a separate document please attach copies of any materials prepared to date that advertise the creation or existence of the chapter or any meetings or functions planned or held to date.

# INDIVIDUAL CHAPTER PROFILES

---

## EXPLANATION OF SUMMARY CHART CATEGORIES

Year Begun	=	Date Chapter became active, regardless of incorporation date
Incorporated	=	Filed Articles of Incorporation with State as a Non-Profit Organization
By-Laws	=	Developed and uses By-Laws whether incorporated or not
Mission Statement	=	Has formal written Statement of Purpose (may be same as in Articles)
Federal ID Number	=	Filed and received a Tax Number for the Organization (required by banks)
Bank Account	=	Opened and maintains a checking or other accounts for chapter funds
State League	=	Maintains formal affiliation with a State Municipal League or County Association
Directors Elected By	=	Number of Directors and Method or Body used to elect Directors
Officers Elected By	=	Method or Body used to elect Officers
Term	=	Period between each election
Nat'l Mbr IS ChapMbr	=	Chapter composed entirely of people who are national NATOA members. No chapter membership independent of national NATOA membership
Member Type / Due	=	For Chapters with membership dues independent from national NATOA, categories of membership and dues for each
# Mtgs per yr	=	How often does the group meet and/or nature of meeting
Mbr Brochure	=	Uses printed membership brochure to solicit new or renewal members
Newsletter/Frequency	=	Type of publication and how often prepared or distributed
Action Alerts	=	Type of vehicle used for emergency communications / urgent issues
Conferences/Seminars	=	Chapter does "open to public" educational events with registration fees
Key Activities or Focus	=	Primary work done by Chapter for its members recently

	BALT-WASH	CAROLINAS	COLORADO	FLORIDA	HAWAII	ILLINOIS
Year Begun		1991	1994	1994		1984
Incorporated			Yes	No		No
Name Registr		Yes	Yes	Yes		
By-Laws		Draft Only	Yes	Yes - 2000		Yes - 1996
Mission State		No	Yes	No		Yes
Fed Tax #			Yes	No		Yes
Bank Account		Yes	Yes	No		Yes
State League		No		No		No
Directors Elected By		Non	Members	None - only officers		None - only officers
Officers Elected By		Members	Members	President only Members		Pres/VP/Secy/ TR Voting Members
Term Length		1 year	One Year	One Year		1 year
Member Type		Under Discussion	Nat'l Mbr NOT ChapterMbr Non-national may join	Nat'l Member IS ChapMembr Non-nat'l may join		Nat'l Mbr NOT auto Chapter Mbr Non-nat'l may join
Industry Mbr		Yes	yes	Yes - Non-voting		
Dues			\$50 Individual	None		\$60 Individual \$60 Agency +\$10 each add'l \$30 N-V Assoc
# Mtgs per yr		One	One Member Mtg Ten Board Mtgs	One		4
Mbr Brochure		No	No	No		
Newsletter		No	Occasional	None		
Action Alerts		e-mail	e-mail, fax	email listserve		e-mail
Conferences or Seminars		One	One	One - 1 day cable/telecom		One 1 day

Key Activities or Focus		Issue sharing & support as needed	Legislation Networking & communication s			conference, biz mtgs, lobbying
----------------------------	--	---	---	--	--	-----------------------------------

	INDIANA	KENTUCKY	MASSACHUS	MICHIGAN	MINNESOTA	MISSOURI
Year Begun	1998			1983	1983	1986
Incorporated	No		No	Yes	1983 501(c)3 to 1996 501(c)6	Yes - general non-profit
Name Regist	No		No		Yes	Yes
By-Laws	No		No	Yes	Yes	Yes
Mission State	No			In Bylaws	Yes	Yes
Fed Tax #	No		No		41-1879483	Yes
BankAccount	No		No	Yes	Yes	Yes
State League Relationships	Informal - Indiana AssnCitiesTow ns		No	Informal- Michigan Muni League	Formal League MNCities	Formal Affiliate of MO Muni Lg '86
Directors Elected By	None		None	None	7 Voting member	2 plus 3 Officers Voting Members
Officers Elected By	Volunteer - until another willing		Volunteer - until another willing	Pres/VP/Secy- Trs Voting Members	Bd of Directors	Pres/VP/Sec- Trs Voting Members
Term Length	Open		Open	1 year	1yr Off / 2yr Dir	1 year
Membership Type	Nat'l Mbr IS auto Chapter Mbr  Non-National may join		Nat'l Mbr NOT auto Chapter Mbr  Non-National may join	Nat'l Mbr NOT auto Chapter Mbr  Non-National may join	Nat'l Mbr NOT auto Chapter Mbr  Non-National may join	Nat'l Mbr NOT auto Chppter Mbr  Non-National may join
Industry Mbr	Yes - Non- Voting		No	Yes - NonVoting	No	Yes- Non- Voting
Dues	None		None	\$100 Full Member \$100 Associate	Agency Members  Associate Members	\$20 Individual \$30 Small Agenc \$40 Large Agenc \$10 Associate
# Mtgs per yr	As needed		2 - 3	4 - 6	2 - 5 Annual @ confer	1 Annual BizMtg 1 Nat'l Conferenc

Mbr Brchure	No		No	Yes	Yes	Yes
Newsletter	No		No	Flyers and Letters as necessary	Quarterly mailed metered bulk rate	<a href="http://home.kc.rr.com.wgeary/NATO A">http://home.kc.rr.com.wgeary/NATO A</a>
Action Alerts	Phone E-mails		List- Serve	broadcast fax phone	broadcast fax e-mail	broadcast fax broadcast e-mail
Conferences or Seminars	No		No	3 day seminar with Michigan Assn of Broadcasters	Yes - publicized thru League and NATOA lists	No
Key Activities or Focus	Indiana Telecommunications Task Force  State Legislation		Regular mtgs w/ Mass CableTV Division File Comments in FCC rulemakings	state legislation  cable transfers  PROW	StateLegislation!!  conference  outstate outreach	State Legislation  Share/Network on Cable/Telcom  Member Directry

	OREGON	CALIF-NEVADA	TEXAS	VIRGINIA	WASHINGTON	WISCONSIN
Year Begun	198_?	198_	Jan 1995	May 1998	May 2000	1985
Incorporated	No	No	1996 - 501(c)4	Yes	501(c)3	No
Name Registr	No	No	Yes		Yes	No
By-Laws	Yes	Yes	Yes	Yes	Yes	1984
Mission State	No	Yes	Yes		No	
Fed Tax #	No	Yes	74-2768816	54-1956181		
Bank Account	No	Yes	Yes	Yes	Yes	
State League Affiliation	Formal-League of OregonCities	No	ex officio advisor on Bd	VA Assn Count Staff support	No	Formal-League of Wisconsin Municipalities
Directors Elected By	None	6/Voting Members	Voting Members	None	13 Voting Members	None
Officers Elected By	President only Volunteer	Pres-Elect – Members; Sec’y/Treas – BOD	Voting Members	Voting Members	Voting Members	President Only
Term Length	Open	2 years Pres-Elect – 3	2 years	2 years	2 yr Dir / 1 yr Offc	Open - til some one else does
Member Type	Nat’l Mbr IS auto ChpterMbr Non-Nat’l may also join	National NOT Auto members Non-national may join.	National NOT auto members Non-National may join		National’l NOT auto members Non-National may join	Nat’l Mbr IS auto ChpterMbr Non-Nat’l may also join
Industry Mbr	No	Yes – non-voting	Yes - non-voting		Yes Non-voting	No
Dues Amount	None	National NATOA - \$25 Non-NATOA – Assoc. \$75	\$50 Agency \$50 Individual \$100 Associate	\$100 Regular \$50 Associate	Votng Lg Agency VotingSmAgency \$50 N-V Individ’l \$20 N-V Student \$15 N-V Assoc	None
# Mtgs per yr	1 - 2 informal overlunch 1 at Nat’l	6-10	1 Business Mtg 1 NATOA Annual Chapter Mtg	8 - 10 per year for Current Issues and	4 per year	None since 1986

	OREGON	CALIF-NEVADA	TEXAS	VIRGINIA	WASHINGTON	WISCONSIN
	Conf		1 Board Retreat	one educational presentation		
Mmbr Brchure	No	Yes	letter format	No	No	No
Newsletter	Home Page	Infrequent Use website	Web - www.tatoa.org	Not yet	Not yet	Not recently
Action Alerts	E-mail Home page	Web, list serv, email	broadcast fax email	broadcast fax email	Work plan for Advisory Papers	No
Public Conferences or Seminars	For government only - training seminars with State League	Half/Whole Day Current Issues	2 day Annual legislative, cable telco, PROW, wireless	Planned for 2001	Planned	Previously - in late 1980's
Key Activities or Focus	Seminar on cable franchise fees	Info Sharing	monthly bd mtg annual seminar website		Organizational development committees/plans	Ready for re-vitalization

SAMPLE DOCUMENTS

---

There is no one perfect solution. These examples work for some chapter, somewhere in the country.

Websites

The following Chapters have established websites with varying amounts of information on each. You are encouraged to explore these sites for ideas, examples and sample documents. You should also contact the individual Chapters for additional information or suggestions.

- [www.mtc.org/~macta/](http://www.mtc.org/~macta/)
- [www.home.kc.rr.com/wgeary/NATOA](http://www.home.kc.rr.com/wgeary/NATOA)
- [www.scannatoa.org](http://www.scannatoa.org)
- [www.tatoa.org](http://www.tatoa.org)
- [www.ilnatoa.org](http://www.ilnatoa.org)

Minutes

Sample - check for any requirements in your state

Financial Report

Sample - very simple format for basic reporting

Sample Minutes

---

MINUTES OF THE [Annual, Monthly, Quarely, Special] MEETING  
OF THE [Board of Directors, Officers, Membership] OF THE  
[OFFICIAL NAME OF ORGANIZATION]

Date

The \_\_\_\_\_ meeting of the \_\_\_\_\_ was held at [give address, building name, city, state] on the \_\_\_\_ day of \_\_\_\_\_ 200\_\_\_. The meeting was called to order at \_\_\_\_\_ [a.m. or p.m.] by \_\_\_\_\_ [title and name].

Also in attendance were: Officers \_\_\_\_\_, Board Members or Directors \_\_\_\_\_, Voting Members \_\_\_\_\_ [it is helpful to list name and jurisdiction], constituting a quorum. Also present were non-voting members or guests \_\_\_\_\_.

*NOTE: These lists can be done in paragraph form or columns*

MINUTES of the previous meeting on {date} were presented by the (Secretary, President or whomever) for approval. On a motion by \_\_\_\_\_, seconded by \_\_\_\_\_ the minutes were approved as [read] [corrected or amended as follows - list corrections]

FINANCIAL REPORT for the period \_\_\_\_\_ was presented and discussed by \_\_\_\_\_. Attention was especially drawn to \_\_\_\_\_. On a motion by \_\_\_\_\_, seconded by \_\_\_\_\_, the Financial report was accepted

PRESIDENT'S REPORT

*You may want to summarize any major activities undertaken by Officers since last meeting if not covered in Committee Reports, Old or New Business*

COMMITTEE REPORTS

*You can summarize verbal presentations or merely reference and attach written reports*

ELECTIONS were conducted in accordance with [the by-laws, custom or whatever] . Nominations were accepted from the floor. {Briefly describe who was nominated, who volunteered, who was elected and how they were elected. For example, by a vote of \_\_\_ to \_\_\_, or by acclamation, or whatever your process is. If it required a motion, use a variation of the format below} Those elected will serve a term of \_\_\_\_\_ years or until their successor is elected.

OLD BUSINESS

Name of Item

Keep descriptions of debate or discussion brief and discrete....use a reference to maintain a thread from which meeting this item was previously discussed

Name of Item

NEW BUSINESS

*see below for how to document a resolution on any item*

Name of Item

Keep description of debate or discussion brief and discreet, but paint enough of a picture that later readers will understand the essence of what was said or done

Name of Item

\*\*\*\*\*

*FOR ANY FORMAL ACTION, VOTE OR RESOLUTION -  
IDENT IT, BOLD IT, AND MAKE IT PROMINENT*

On a motion by \_\_\_\_\_, seconded by \_\_\_\_\_ the following resolution was adopted by  
*[unanimously, by a vote of \_\_\_ to \_\_\_ with \_\_\_ absententions]*

Resolved, that the President is hereby authorized and empowered on behalf of the membership, or Board of Directors, or organization to send a letter to the State Municipal Association to apply for status as an affiliate or same, offering the following inducements, terms or conditions.....

OR

Resolved, that the \_\_\_\_\_ is hereby authorized and empowered to open a checking account for the organization with the WXYZ Bank, such account to require \_\_\_signature(s) of the \_\_\_\_\_, the \_\_\_\_\_, or the \_\_\_\_\_.

OR

Resolved, that the Advocacy Platform on Public Right of Way Use is hereby adopted and the Secretary is directed to attach a copy to the minutes of this meeting.

\*\*\*\*\*

ADJOURNMENT On a motion by \_\_\_\_\_, seconded by \_\_\_\_\_, the meeting was adjourned at \_\_\_\_\_ a.m. or p.m.

Respectfully submitted on (date)  
Name  
Secretary

ATTACHMENTS TO MINUTES

*Include any documents that were approved or adopted  
Be sure to mark each one with the action taken and date*

These minutes were approved as \_\_\_\_\_ on [date]

A Simple Financial Report  
NAME OF ORGANIZATION

---

Financial Report for the Period January 1 - December 31, 2000

---

Account # 1    Operating Funds

Cash on Hand December 31, 1999 \$ 200.00

INCOME

Annual Dues Payments	\$ 450.00
Seminar Registrations - October 15 in New Diego City	\$ 900.00
Luncheon Fees - Annual Meeting- July 1	\$ 220.00
Total	----- \$1570.00

EXPENDITURES

State Annual Registration Fees	\$ 15.00
Postage & Mailings	\$ 176.39
Newsletter Printing	\$ 232.98
Membership Directory Printing	\$ 198.20
Luncheon - Annual Meeting	\$ 190.35
Stationary, & Envelopes	\$ 32.68
Membership Brochure	\$ 90.00
Miscellaneous (Long-distance reimbursements)	\$ 27.62
Web Site Domain Registration	\$ 75.00
NATOA Legal Defense Fund	\$ 200.00
Total	----- \$1238.22

Excess of Income over Expenditures \$ 331.78

Cash on Hand December 31, 2000 \$ 531.78

ACCOUNTS RECEIVABLE    List Source and Amount  
ACCOUNTS PAYABLE        List Source and Amount

---

Account # 2 - Legislative Advocacy Fund

Cash on Hand December 31, 1999 \$ 0

INCOME Contributions	\$ 1300.00
EXPENDITURES Advocacy Platform Printing and Mailing	\$ 1136.50
Fund Balance and Cash on Hand December 31, 2000	\$ 164.50

ACCOUNTS RECEIVABLE    List Source and Amount  
ACCOUNTS PAYABLE        List Source and Amount

Respectfully submitted on [date]  
Name & Title

NATOA ANNUAL REPORT FOR CHAPTERS:

(Chapter Name)  
(Chapter Acronym)  
(Chapter President)  
(Date submitted)  
FY \_\_ Chapter Report

Report should include:

- Date formed
- Membership status
  - Number of National NATOA members
  - Number of Non-National NATOA members
- Dues structure
  - Dues for National NATOA members
  - Dues for Non-National NATOA members
  - Other dues structure if established (please explain)
- Membership benefits/privileges (please list)
- Titles of any publications the chapter has created or assembled that are or could be used for distribution (Please include one copy of each and copies of any promotional materials).
- Chapter seminar(s)/meeting(s)/workshop(s) held this year:
  - When
  - Where
  - Number of attendees
  - Please provide a copy of promotional material and program.
- Legislative or legal initiatives by members and the chapter as a whole.
- Membership recruitment activities and results (Please include any marketing materials).
- Membership List with names, addresses, phone, fax, e-mail (hard copy & electronic copy).

Financial Status

- Please submit a current statement of income and expenses and the balance for the chapter bank account and/or petty cash, etc.
- Bylaws – Please provide a copy of the most recent version of your bylaws.
- Annual Elections:
  - When are the Chapter elections held each year?
  - Who are the current members of your chapter board? (Please list with appropriate contact information)
- Who is/are the chapter representative(s)
  - Please list individually with title within the Chapter and all appropriate contact information.
  - One or more people should be chosen to be the liaison(s) to the national office. Please use this report to notify the national office as to the appropriate contact person(s) for the coming year. These individuals must have access to e-mail and to the Internet. Responsibilities will include maintaining regular contact with the national office, providing updates on chapter activities and providing information from national back to the chapter representatives.

## VERY SIMPLE BUDGET for NATOA Chapter

### Chapter Budget

#### Revenues

Membership  
Interest Income  
Miscellaneous/Other  
Annual Conference Income  
Other event income

#### Total Revenue

#### Expenses

Annual Conference  
Other Event Expenses  
Newsletters expense  
Internet Expenses  
NATOA legal contribution

#### Total Expenses

#### Net Income