The Essentials for Starting a Chapter

Welcome to the exciting journey to bring a new National Charity League, Inc. (NCL) chapter to your community! Each chapter is its own 501(c)(3) corporation, incorporated in the state of origin and affiliated with NCL, Inc. All NCL, Inc. chapters are non-sectarian and nonpolitical in their purpose and activities. As an affiliated chapter of NCL, Inc., your new chapter will benefit from the programming, governance, training, and branding of this national organization serving communities across the United States for nearly 100 years.

NCL, Inc. is honored and privileged to partner with you as you start a new NCL chapter and positively impact your community for generations to come! Along your journey to start a chapter, you will be supported by the new chapter support team, which consists of staff and volunteers who mentor and advise your new chapter. This support team and specifically your New Chapter Advisor, will work closely with your Board to pace and guide your chapter through the start-up phase and the first few years.

About NCL

In 1925, a group of women led by Gladys Wilkinson gathered as Patronesses of the Los Angeles community to make layettes for the American Red Cross and to assemble food baskets for the hungry. The hands-on volunteerism caught on when their daughters, known as Ticktockers, began filling baskets of their own. The gatherings grew organically into nonprofit chapters, governed by a volunteer board of directors. In 1958, National Charity League, Inc. was incorporated with the purpose of expanding NCL’s impact through the formation and support of chapters and their members. National Charity League is now the largest mother-daughter philanthropy in the nation, with NCL Patronesses (mothers) and Ticktockers (daughters) impacting over 6,000 charities through nearly 3 million volunteer hours annually.

Mission
Fostering the mother-daughter relationship through an ongoing commitment to philanthropy, culture and leadership.

Vision
Connecting hearts, hands and minds so that every community thrives.

Core Values
Strengthening the mother-daughter bond
Empowering women with the skills and confidence to mentor and lead
Inspiring a legacy of social awareness and compassion
Providing depth of support in local communities
Honoring a culture of diversity, equity and inclusion
Modeling integrity, graciousness and excellence
## Start a Chapter

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Start a Chapter

This Guide
The Essentials for Starting a Chapter guide is designed as an interactive resource, referring you to important and useful documents as you need them. Any items in BOLD are additional resources available to you from NCL, Inc.

Starting a chapter takes time and dedication to set a firm mission-focused foundation. Communication and education will also be keys to your success. Programming and resources have been developed specific to your needs. You do not need to create materials. If you find you have questions or lack a resource, please ask your new chapter support team.

This guide is the property of NCL, Inc. and is not to be shared outside of the organization except with Board members who have signed the Non-Disclosure Agreement and solely for the purposes of starting an affiliate chapter of National Charity League, Inc.

NCL Video Training Calls
These calls are required for all Board members and begin once you have at least 5 women committed to serving on the Board. The New Chapter Timeline includes a more robust outline of the process to start a chapter.

Call 1: NCL Basics         Week 1
Call 2: Essentials for Starting a Chapter Guide    Week 3
Call 3: Board Training        Week 5
Call 4: Formation Preparation       Week 7
Formation (Virtual)     Week 8

Board Preparation

NCL, Inc. chapters are managed and governed by a Board of Directors who are active Patronesses. As a new chapter, at least 5 of the 9 required Board members are needed to start making chapter decisions. These decisions will be key to building the foundation of a strong chapter.

NCL Member Template
This spreadsheet will be used throughout the start-up process to gather contact information for Board members, prospective members and those who join as of the Formation. Follow the instructions on the template carefully. This template must be accurate to upload to the NCL website that will be created for your chapter. Please send the completed Board tab into NCL, Inc. as soon as possible. You will be asked to share the NCL Member Template periodically through the formation process.
New Chapter Information
With at least 5 Board members, complete the New Chapter Information sheet and return it to NCL, Inc. for final approval. You may not publish or share this document until you receive approval from NCL, Inc. The information in this section will help your Board to make the following decisions:

Chapter Basics
Chapter Name & Boundaries: These are determined by NCL, Inc. with input from your Board.

Grade Levels: All chapters start with grades 7th–9th and must have at least some representation of these starting grades. The grades do not have to be equally filled during the first year. If planning to form between January–June, then 6th graders may be included as they are considered “rising 7th graders.” Most new chapters include 10th graders and some include 11th or 12th graders if there are older sisters or interest in these grades.

Meetings & Dates
The NCL year is June 1–May 31. Meetings typically follow the school year calendar. In a full 12-month NCL year, the chapter will hold a minimum of 8 Patroness meetings, of which Patronesses will be required to attend at least 5. The Ticktockers will hold a minimum of 8 grade level meetings, of which they will be required to attend at least 6. The Kickoff and Tea will count as meetings. If the chapter forms after June, you will schedule less meetings during the first year. Deciding dates early in the process allows for faster formation and streamlined training.

Your group of 5 or more Board members will decide:

- Information Meeting Date(s): to educate about and build interest in NCL
- Formation Date: held virtually to officially become a chapter
- Kickoff Date: the first in-person meeting with all mothers & daughters; set about 6-8 weeks after Formation
- Tea Date: held in late spring (no Tea the first year if formed Jan–May)
- Patroness Meeting Day: each month (i.e., 1st Tuesday of the month at 6pm); Patroness & Ticktocker meetings cannot be at the same time
- Ticktocker Meeting Day: each month (i.e., 1st Sunday of the month at 4pm); often the hardest meeting to schedule, this is a tentative meeting day and time, which can be adjusted by each class after Kickoff if necessary
- Release Date of Prospective Member Packets: this packet includes the application and forms for membership; this date may be right away unless you are in an area with other NCL chapters; in that case, the application release will be no more than 45 days prior to the Formation date.
- Due Date of Application: one week prior to the Formation; you may accept late applications up until the day of the Formation with guidance from your new chapter support team if there is space available and the Board agrees to do so.
Dues & Fees
Board members will determine initial dues and entrance fees for your members. Dues and fees are collected annually in April before the start of each NCL year. Starting a chapter January–May extends founding member dues until the end of the following year’s fiscal year which is May 31st. Consider this when setting your dues and fees. Also, take into consideration the cost of living in your area and the cost of event spaces for 100–200+ people. Best practice dictates that dues and fees are not adjusted in the first three years of a new chapter, except to add event fees when appropriate. Payment plans or discounts for multiple daughters are discouraged.

Below are the average dues and fees for most new chapters. The minimum costs associated with starting a chapter with 30 Patrons is approximately $135–$175 per person, depending on location and the Tea fee voted on later by members.

Chapter Annual Dues (paid annually):
Patroness........................................ $110–$150                     Suggested amount $135
Ticktocker........................................ $110–$150                     Suggested amount $135

Chapter Entrance Fees (paid one time upon joining):
Patroness........................................ $25–$50                      Suggested amount $25
Ticktocker......................................... $25–$50                      Suggested amount $25

Total for Patroness and one Ticktocker:
Upon joining:                                         Suggested $320
Each year thereafter:                                 Suggested $270

The chapter entrance fee is a one-time fee paid by each Patroness and each Ticktocker when they join. Entrance fees help cover expenses associated with bringing in new members (i.e., for new members’ NCL t-shirts, name tags, information meetings, etc.). In the beginning, the entrance fee will also help build reserves for chapter health. New members will pay the chapter entrance fee and the chapter annual dues when they join. Thereafter, they will only pay the chapter annual dues.

The chapter dues are paid per person annually. Dues are used for meeting space, programming, organizational costs like printing, postage, safe deposit box, banking, P.O. Box, fees to incorporate in the state and file for federal 501(c)(3) nonprofit status, purchasing General Liability insurance and Directors & Officers insurance, maintaining chapter website, banking and accounting, newsletters, other forms of communication, meeting venues and expenses, philanthropy supplies, etc., as well as other mission-based expenses. Dues also cover the cost to send your chapter leaders to area meetings and annual conference. Chapter dues include the national dues amount per member which are paid directly to NCL, Inc. for affiliation, training, education, branding, and staff support. The national dues amount ($35 per person) is built into the suggested chapter dues.

Additional Fees
For now, your dues and fees cover all chapter expenses. However, your Board and members will vote on an additional fee to cover the Tea. Your New Chapter Advisor will assist you in making this decision after Kickoff. Many chapters charge $25–$35 per member for the Tea. This amount is in addition to the dues & fees to join the chapter.
Chapters are required to hold a Tea and Senior Recognition event each year. These events are typically combined during the first few years as you are getting started and then the Senior Recognition may become a separate event. As your chapter makes decisions about events, additional event fees will be voted on by the Patroness members and added to the Chapter Dues & Fees policy.

While fundraising is not encouraged during the startup phase, your chapter may accept donations once it has its 501(c)(3) status. Under the IRS rules, members may not financially benefit from their association with an organization. Therefore, be careful that all programming remains mission based. Also, when deciding on ticket prices and/or fees, it is important to know the tax implications in your state. See Treasurer Toolkit and refer to www.irs.gov for more information.

**Budget**

New chapters want a deeper understanding of how the budget needed to run a chapter will affect the amount for dues they decide to charge. The suggested amounts of dues and fees will sustain a new chapter of 30 Patronesses and 30 Ticktockers for Year One.

The Multi-year Budget template is based on formulas and suggestions in the columns as a "best guess" forecast to prove your chapter will be financially secure over the next three years. This is approved by NCL, Inc. after Kickoff and the corporation filing is complete. You will add "actuals" as they become available over time, keeping it updated and accurate. More training will come from the new chapter support team after Kickoff. You will not use or complete this budget until that time.

**Board Toolkits**

Your President has provided you with the Board Position Descriptions and you have chosen your role. Reading this Essentials for Starting a Chapter guide thoroughly helps you understand how you fit on the Board as a team member and provides an overview of the complete chapter formation process. Your position has additional details and resources available in a toolkit. Use the supplemental materials in the toolkit to execute your duties and educate the rest of the Board on the special details of your position. All Board members are invited and encouraged to explore each toolkit:

- President Toolkit
- VP Membership Toolkit
- VP Philanthropy Toolkit
- VP Ticktockers Toolkit
- VP Patroness Activities Toolkit
- VP Communications Toolkit
- Treasurer Toolkit
- Secretary Toolkit
- Parliamentarian Toolkit

After Formation, all Board members will have access to the members’ only section of the NCL, Inc. website where more comprehensive training and resource materials for each position can be found. Your new chapter support team will continue to train and mentor you as well.
Governing Documents
Chapter bylaws are created and sent to you by NCL, Inc. Until then, a New Chapter Bylaws generic version is provided and contains the identical text for reference. The Secretary will sign your chapter’s official bylaws at the Formation.

The chapter policies & procedures manual is created and sent to you by NCL, Inc. Until then, a New Chapter Policies & Procedures generic version is provided and contains the identical text for reference.

Board members will read both the bylaws and the policies and procedures manual and familiarize themselves with the parts specific to their role. Your chapter’s governing documents will be posted on your website after Formation for all members to access. You will not amend either document during the start-up phase unless directed to do so by your New Chapter Advisor. The Parliamentarian will keep a copy of each document so that she can easily reference the governing documents during meetings.

Build Membership
When you form, your membership will be filled on a first-come, first-served basis, open to anyone who meets the membership requirements and is in accordance with your boundaries. NCL, Inc. markets your forming chapter through announcements to the local NCL leaders, press releases and/or social media, while also providing resources for your forming chapter to engage in local marketing. All Board members will participate in marketing and inviting members. You are encouraged to invite and admit as many mothers and daughters as possible. Until the chapter forms, all Board members must include the word “forming” chapter in their email signature, announcements, etc.

Prospective Member Packet
The Prospective Member Packet is the application packet with information about NCL, your chapter and the required membership forms. NCL, Inc. will inform you when to complete this packet and will approve it before you distribute it to prospective members.

Most chapters send this packet out electronically and ask prospective members to print and return the completed forms before Formation. The VP Membership typically sends this out, but any Board member may forward it to friends. In future years, the application and forms will be filled out and submitted online through your chapter’s website.

You may not collect payment of dues and fees until 30 days before your Formation date. Upon receipt of the forms and payment, the VP Membership will track data on the NCL Member Template. Include date and time if class size is a concern.

Respond with:
Welcome Letter in President Toolkit
Invitation to Formation in Marketing Toolkit
Philanthropy Partner Voting Sheet in VP Philanthropy Toolkit

Membership closes on the due date decided by the Board. It may only be reopened with NCL, Inc. approval and a vote of the Board. At the Formation Board Meeting, the Board will vote on
which classes to reopen (if any), with a start and end date for accepting applications on a first-come, first-served basis. Your goal is to reach 40 Patroness members before the 6 month mark, so many chapters reopen membership to correspond with Kickoff.

Marketing Toolkit

The Marketing Toolkit includes NCL branded material to help the community gain awareness of your forming chapter and increase interest among prospective members. The materials will educate prospective members about NCL and the benefits and obligations of membership. When NCL is new to a community, active marketing helps increase awareness more quickly than just word of mouth. Other materials are provided as available. Please ask your new chapter support team if you need additional marketing materials.

The Social Media Essentials Guide will help you create a chapter Facebook page and Instagram account. Do not use the word “forming” in your page name. Be sure to create it under the NCLChapterName email, which will be provided to you. To market and increase awareness of your forming chapter, your Board may also post information on the following: personal social media account, neighborhood page, school’s parent page, town page, etc.

Information Meetings

Information Meetings are strongly encouraged to help generate a lot of interest quickly and ensure prospective members understand NCL, the program and the membership requirements. The more educated prospective members are about the chapter they are joining, the more committed and engaged they will be when they join. An Information Meeting Presentation and an invitation template are provided to help you share the news about your forming new chapter. These meetings may be held virtually or at a home, library, park, etc. The invitation can be reused later for the Formation and is found in the Marketing Toolkit.

Formation

The chapter is officially formed on the date of the Formation. To form on this day, you need to have at least 30 mothers committed to join with applications and full payment submitted. This is a virtual event lasting approximately 1½ hours and is hosted by the new chapter support team. There are two parts to this important event: The Formation Board Meeting and the all-member Formation Meeting. The Formation schedule and responsibilities listed in the President Toolkit help the Board organize and prepare for the Formation.

In the Formation Board Meeting, an NCL, Inc. representative will lead your Board through discussion and voting on important information, documents, and decisions. The Board may vote whether to reopen classes at this time.

The President signs the Affiliation Agreement and the Secretary signs the bylaws and takes the first official Board meeting minutes. Before the members join, your Board comprises the “qualified members of the organization” and has the authority to approve the bylaws and chapter policies & procedures manual without the Patroness’ vote. Future amendments to the bylaws and policies will be approved by a vote of the Board and Patronesses, with NCL, Inc. approval.

During the Formation Meeting with all members, the NCL, Inc. representative facilitates with your President and welcomes your members to NCL with an inspiring presentation. Board
members are introduced and chapter information is shared with members. Both mothers and daughters are encouraged to attend the Formation Meeting.

**Formation Materials**

**Invitation:** This template is provided in the *Marketing Toolkit*.

**Affiliation Agreement:** This is sent from NCL, Inc. Your chapter will be its own nonprofit organization; however, your chapter will be an affiliate of the parent NCL, Inc. organization. As such, your chapter must abide by NCL, Inc. bylaws, policies, procedures, and guidelines. Your chapter needs to meet certain NCL, Inc. expectations and fulfill obligations to remain an NCL, Inc. affiliated chapter in good standing. Your entire Board will read and understand the Affiliation Agreement. Your President will sign and send the document back to the NCL, Inc. office to be signed by the CEO. A copy is then returned for your records.

**Formation Board Meeting Agenda:** This is a scripted narrative of the first official Board meeting and the motions that will be made. The chapter bylaws and policies & procedures referenced in the agenda are sent to you from NCL, Inc. Generic copies of these governing documents are provided until then. The agenda is in the *President Toolkit*.

**Formation Board Meeting Minutes:** This template mirrors the agenda and outlines everything that will be approved at the Board meeting. These official minutes may be used during the incorporation process. Board minutes are posted in the board-only section of the website. The template is in the *Secretary Toolkit*.

**Formation Meeting Minutes:** This template is used to record the minutes of the first official meeting of the members. Once approved, it will be posted on the website for all members to read. The template is in the *Secretary Toolkit*.

**Philanthropy Partner Voting Sheet:** This template, found in the *VP Philanthropy Toolkit*, is prepared by the VP Philanthropy, and shared with the new chapter support team for approval. It is sent to prospective Patronesses prior to Formation as a survey so that they can vote on the philanthropy options. Based on the outcome of the votes, the Board approves the final philanthropy partners and announces them during the Formation Meeting.

**Core Program Approval Sheet:** The Core Program requires Ticktockers to voice their opinion on specific elements of class focus. The class focus categories found in the *VP Ticktockers Toolkit* are sent to prospective members prior to Formation as a survey so that they can vote on the options. Based on the outcome of the votes, the Board and NCL, Inc. approve the final decisions and announce them during the Formation Meeting.

**Year One**

**Ongoing Support**

Your new chapter support team will guide you through the first year as you set a firm foundation. Your New Chapter Advisor will provide ongoing mentorship to your Board on a deeper level. She is to be copied on all chapter business and will attend Board meetings. NCL, Inc. staff may
also be in contact with certain Board members periodically and will hold one-on-one calls with the President throughout the year. Trainings are provided regularly from NCL, Inc. through live videos, recordings, Q&A’s, and communications.

**Corporation**
The Treasurer begins the corporation process immediately following Formation. She incorporates the chapter in the state, applies for 501(c)(3) status with the IRS, opens banking with Billhighway, obtains insurance, and completes important documents she must file and receive. Costs anticipated after Formation are paid through the chapter bank account once it is opened and dues and fees are deposited. IRS and state fees must be paid by personal credit card and reimbursed by the chapter. The new chapter support team provides guidance through the process which takes approximately 1–2 months. Complete details are in the **Treasurer Toolkit**.

**Kickoff**
Kickoff is the first meeting where mothers and daughters meet together in-person to celebrate the start of the new NCL chapter. After this initial Kickoff, the chapter will hold this event annually during the back-to-school season. The VP Patroness Activities plans the event with the President and includes the VP Ticktockers, who oversees the grade level breakouts. Board members are introduced and assist with the presentation.

The Patronesses break out into committee meetings while the Ticktockers break into grade level meetings. Committees vary greatly in their speed of training and activities. More information about committee training is included in toolkits or provided by the New Chapter Advisor.

The **Kickoff Toolkit** contains an agenda, ideas for programming, and committee breakouts. The **Kickoff Presentation** PowerPoint may be edited and personalized.

**NCL T-Shirts**
NCL members are identified in the community while volunteering by NCL logo wear. Proper NCL, Inc. branding is important and empowers the overall NCL brand. It is vital that your chapter adheres to the specific branding requirements and guidelines. Consistency in how NCL logos, icons, fonts, colors and images are displayed, helps make NCL more identifiable. More branding information is available on the NCL, Inc. website. NCL T-shirts must be purchased through an NCL-approved Affinity vendor and according to the Preliminary Budget after Formation. One T-shirt for each new member is built into the entrance fee.

**Patroness Committees and Training**
Best practice leadership policies require a Patroness to hold at least one leadership role during her active NCL years. Leadership roles include board, grade level advisor (GLA), chair and liaison positions. Committee and leadership roles are one-year commitments. Patronesses are expected to serve no more than 2 years in the same role, to allow for leadership to be shared across the membership. Patronesses are given the opportunity to rank their committee preference in the Prospective Member Packet on their application.

Patroness placement charts will help you place Patronesses and explain the structure of the chapter to members. Your New Chapter Advisor will help your Board complete this soon after Formation. The committees will change over the first few years as the chapter grows. Starting in Year Two, the duty of Patroness placement falls to the President Elect and a placement...
committee. Members are surveyed in the spring to learn their job preference. The Board has the final authority to assign Patronesses to their positions.

Once Patroness placement is complete, contact each member to let them know to which committee they are assigned. The committees will meet during the breakout at Kickoff. Some committees may begin training before Kickoff, depending on the role.

Certain committees are defined specifically in the bylaws and policies & procedures. Your New Chapter Advisor will provide guidance around committees during your first year and then help you transition to larger committees during Year Two and Year Three.

**Board Meetings**
Your Board meetings are extremely important to the success of building your chapter and setting a firm foundation. Every Board member is expected to attend each meeting. Examples of each item listed below can be found in the President’s section of the NCL, Inc. website.

- **Board Norms** will be adopted with changes as amended by your Board. This sets the stage for how you plan to communicate, respond, and conduct business with each other.

- **Board Reports** will be sent monthly from each Board member by the determined deadline. The Secretary and President will put the information on the agenda. Educating each other about the responsibilities of your role is very important for the cohesiveness of the team, so each of you will share what you and your committees are doing, what you have accomplished since the last meeting and what is in the planning stages for the future. Board reports also help establish a timeline for next year’s duties and for your successor. A simplified board report template is in the Secretary Toolkit.

- **Board Agenda samples** are available to ensure you accomplish the immediate needs of the chapter and serve as an example for future agendas. The President and Secretary work together to set the agenda with guidance from your New Chapter Advisor. The agenda should be emailed to Board members ahead of time. Each Board member should read the agenda and other board reports and determine which items in her area should be discussed.

By Year Two, some items will become routine. Items that do not need discussion may be placed on a Consent Agenda. This tool will make your meetings run smoothly and efficiently. Your New Chapter Advisor will mentor you on using consent agendas.

**Multi-year Budget**
The Multi-year Budget covers Formation through Year Three and is an estimate of your income and expenses based on projections of your growth, events, and activities. The Multi-year Budget is completed with the Treasurer and the new chapter support team and voted on by the Board and the Patronesses within the first 6 months after Formation.

**Patroness Meetings**
Patroness Meetings are held at least 8 times per year, typically August through May. The VP Patroness Activities and President will create the agenda together, adding board reports for the business section of the meeting. The programming section of the meeting may consist of a speaker, an activity, or both. The total meeting time should be 1–2 hours. Allow time at the
beginning of the meeting for Patronesses to network and socialize. Each Board member gives a report and voting takes place when needed.

Name tags, icebreakers and an inspiration are best practices at every meeting as you incorporate the NCL programming pillars. Have fun with the seating arrangements so Patronesses can bond and get to know one another (i.e., by grade level, shared birthday months, committees, birth order within your family, etc.). Remember, it is not appropriate to have prayer, religious or political content at any NCL meetings or events.

It is strongly recommended that you do not include alcoholic beverages at Patroness meetings. More ideas for engaging Patroness meetings are in the VP Patroness Activities Toolkit.

Core Program
The VP Ticktockers is responsible for oversight and coordination of the Core Program, which provides learning and growth opportunities for Ticktockers in support of NCL’s mission, vision and core values. The curriculum focuses on age-appropriate philanthropy, culture and leadership activities. Ticktockers provide input in curating select grade level focus areas, and the program is evaluated annually. The chapter’s Core Program is based on a standardized template which NCL, Inc. tailors per the chapter’s decisions in the Core Program Approval sheet. The Core Program Approval sheet is due by Formation and is in the VP Ticktockers Toolkit.

Ticktocker Meetings
Ticktocker Meetings are held monthly throughout the school year. The girls are empowered and taught to lead their own meetings with the GLAs as mentors. By this time, the VP Ticktockers has been provided with materials and training. Utilizing the Core Program, each class will decide how they would like to meet the programming pillars so that the experience is Ticktocker-led. The GLAs will serve as guides but the girls will decide the type of speakers, activities and experiences they would like for the year. GLA Meeting Topics Guide is located on the website and shared during training.

Nominating Committee & Elections
Nominating Committee training resources on the website walk the Parliamentarian through the nominating process. The timeline for Year Two will follow your governing documents, but Year One may be modified, depending on the Formation date.

The committee will be slating the entire Board, including new positions of President Elect and VP Provisionals. While many founding Board members serve Year One and Year Two, technically the role ends May 31st of each year and Board members must be slated to serve a second term. In order to avoid the majority of the Board changing Year Two, a few founding Board members may wish to rotate off at the end of Year One. They may always self-nominate to return to the Board in future years.

These first two years are typically the only time your chapter may have the same President for two years. Every year thereafter, the President Elect automatically becomes the next President.

President Elect
Added Year Two, the President Elect strengthens the continuum of chapter leadership, gaining knowledge of all chapter leadership roles and documents, in preparation to assume the role of
President. She is responsible for learning the function of the board positions and their committees by attending and learning for one year with the President as her mentor. She carries the duty of Patroness job placement with a committee each spring before her presidency.

VP Provisionals
Added Year Two, the VP Provisionals implements the provisional program. With the help of a committee, she supports those who have most recently become members to help them develop into engaged, contributing members with a strong understanding of their role in NCL. She helps the chapter develop succession planning. Once identified, the VP Provisionals may assist the VP Membership before her official June 1st start date.

Tea
The Tea is a required annual event. In a new chapter, the best practice is for the Tea to be held in the spring for the first year. This allows plenty of time for a membership vote on the Tea fee and to focus on programming. If your chapter forms Dec–May, your first Tea may be held in the spring of the following year. Your New Chapter Advisor will share a range of models to discuss with your members. See the VP Patroness Activities Toolkit for more details.

Typically, Ticktockers have a role in planning and executing the Tea. The first Tea may not have as much Ticktocker influence due to the start-up process. By the second Tea, Ticktockers will be included in planning and participate in etiquette training. This is an excellent opportunity for Ticktockers to learn event planning and practice new skills in a safe environment. This builds confidence and leadership. The VP Patroness Activities will work with the VP Ticktockers. They will each work with their committees on teaching the importance of Ticktocker involvement.

Membership Drive
Your chapter will hold a Membership Drive each year to bring in new members and add members to classes that are not yet full per your chapter policies and procedures. Typically, the annual Membership Drive begins in October with information meetings and applications distributed. Applications are collected in January, selections are made in February, and invitations or regrets are given by March. Once this process is completed, no additional members may be added until the next drive. NCL does not offer rolling or open admission.

Chapters formed January–June will hold a regular Membership Drive beginning in October. Chapters formed between July–December will hold a modified Membership Drive which shifts the time frame. Your New Chapter Advisor will help you through this process and provide modified documents for the process.

More information is provided on the website under NCL, Inc. Resources > Chapter Leaders > VP Membership.

Chartering
Chartering occurs at the end of Year One or Year Two. When a chapter charters, it means the chapter has met the required milestones of the start-up process, is now recognized as a chartered NCL, Inc. affiliated chapter, and is a member of NCL, Inc. (the national organization). Chartered chapters have a delegate who votes at National Council Meetings (the official meetings of NCL, Inc.). Chartered chapters are held to the good standing requirements in the Affiliation Agreement and pay national dues and fees. The chartering timeline depends on many factors which may be tailored to your chapter, but in general follows the timeline below:
Formation January–June:

- Form with current 6th graders (incoming 7th graders)
- Hold regular Membership Drive on standardized timeline
- Hold nominating process per bylaws
- Hold first Tea the following spring
- Charter the following May

Formation July–October:

- Form with 7th graders
- Hold modified Membership Drive
- Hold nominating process per bylaws (may be on a modified timeline)
- Hold first Tea in the Spring
- Charter in May of Year One or Year Two

Policy Updates
Upon chartering, certain policies may need to be updated, specifically Dues and Fees and Philanthropy. Your New Chapter Advisor will guide you through this process.

Financial Review Committee
At the end of the chapter’s first full fiscal year, the Board will establish a Financial Review Committee to conduct an annual review of the financial records. No member of the committee may be the Treasurer or a member authorized to sign, approve or issue disbursements. This review is described in your policies and your New Chapter Advisor will assist you in this process. Thereafter, you will conduct this review annually.

Years Two and Three

Board Orientation
Your incoming President will hold a Board Orientation with the incoming Board members each year. Best practice is to hold the orientation as soon as the new NCL year begins June 1. Each year the President, along with her Board, sets a master calendar for the year. All dates for meetings and events are listed and posted on the website prior to the start of the school year to ensure maximum member participation. Many resources are available on the website for a successful Board Orientation.

Patroness Partners
A Patroness Partner is a Board member who connects and works with her Ticktocker board counterparts throughout the year. It is an important mentoring and learning opportunity for Ticktocker board members, and a way for Patroness Board members to have a better understanding of what Ticktockers experience within their grade levels. She assists with Ticktocker Officer training and checks in with her mentee mid-year and at the end of the year.
This program component is introduced in Year Two once the Board feels ready to take on this extra responsibility. The website contains many resources and your New Chapter Advisor will help you layer on this program.

**Awards**

NCL, Inc. has a variety of national awards that chapter members may earn each year. Your chapter is encouraged to foster a culture of volunteerism above and beyond the minimum requirements by promoting these awards. Ticktockers will be able to meet community needs and make a significant impact on the community, while also achieving and being recognized with these awards.

Celebrating your members’ hours accomplishments is a wonderful way to foster a culture that recognizes impact and how your chapter helps develop a passion for philanthropy. Your New Chapter Advisor will help you create an awards event after your first full year during your next Fall Kickoff with Awards.

**Standards**

The Standards Committee is described in your governing documents. Its purpose is to ensure all members remain in good standing, as laid out in the bylaws and governing documents. Should a member not fulfill their good standing membership requirements, this committee will determine the steps to restore the member back to good standing. The procedure is detailed in the governing documents. Your New Chapter Advisor will guide the Standards Committee throughout Year Two.

**Patroness Survey & Job Placement**

Toward the end of the NCL year, your Board will send a Patroness Survey to members to obtain their input on the chapter’s events, meetings, and programs. Ticktockers will have their own survey starting in Year Three through the Ticktocker Council. The incoming Board will use the survey to plan the upcoming NCL year.

You may combine the Patroness survey with a Patroness interest sheet to see which committee the mother would like to be on the next year.

Patroness placement will fall under the duties of the President Elect in Year Two, so involve the newly elected President Elect in the process. Your New Chapter Advisor will guide you as you continue to develop the process.

**Budget and Finance Committee**

Comprising the Treasurer, President Elect and one other Board member, the Budget and Finance Committee prepares the budget each spring for the upcoming NCL year. Using your Multi-year Budget as approved by NCL, Inc., assess and adjust the next year’s budget as needed. This committee will convene each year. The governing documents describe the committee and procedures. Your New Chapter Advisor will provide guidance.

**Ticktocker Council**

The Ticktocker Council is composed of Ticktockers from each grade level who meet 2-4 times throughout the year to evaluate programs and events for Ticktockers and give their overall feedback on the Core Program. The Core Program can be updated and approved annually by the voting membership with the Ticktocker input.
The exact composition of the Ticktocker Council is detailed in the chapter’s policy. The Ticktocker Council will prepare, send, and analyze a survey of all Ticktockers and report back to the chapter at the end of the year.

The Ticktocker Council will be included in Ticktocker leadership assignments beginning in Year Two or Year Three. This gives the new chapter adequate time to build membership, create Ticktocker programming and train strong GLAs. Support will be provided to help you build the Ticktocker Council using resources from the website.

**Senior Recognition**
While the Senior Recognition is an annually required event, you will likely have your first Seniors in Year Three. At the beginning of the year, a committee chosen in Year Two will plan the Senior Recognition event. Your New Chapter Advisor will provide you with ideas and examples for this event. You may also research the events of other chapters to get ideas.

Often, Seniors are required to finish their hours several months before the May 31st deadline to be eligible to receive awards at the Senior Recognition event. Your New Chapter Advisor can make recommendations for the deadline and how to amend your bylaws and policies accordingly.

Remember that any cost for a Senior Recognition event must be well communicated and voted on by the membership. Be sure to allow the Ticktockers a voice in the event.

**Forever NCL**
Members who continue to be involved in NCL after graduation are called Sustainers and are invited to participate in our Forever NCL program. This includes a variety of chapter-level and national opportunities to volunteer, engage, learn and grow. Sustainers pay a nominal fee to continue membership in NCL.