



Chapter Formation Guidelines

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Brief Task Description	Contact Person
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I. FORMATION OF THE CHAPTER	
Identification of Potential Future Leaders/Chapters	
• Schedule Meet & Greet with National	
Meet & Greet	
• Presentation	
• Show Collateral material	
• Completion of Chapter BOD application packages	
BOD Application Process (Reviewed by National Compliance Director)	
• Receipt of applications	
• Verify license on all websites and references	
• Upload applications into the Google Drive under name of New Chapter	
• NHORA National to vote/approve new chapter BOD	
• NHORA National provides Welcome Letter to the New Chapter	
• Press Release and social media blitz announcing the opening of Chapter	
Chapter Affiliate Certification	
• Send out New Chapter Formation Guidelines signed by Chapter President & Secretary	
• Receipt of Founding BOD Membership Fee (Seed Money)	
Initial Chapter Executive Board Meeting	
Chapter President & Treasurer establish chapter Wells Fargo Bank Account	
• Make an appointment at your local Wells Fargo establishing your profile within the WF internal system (5-7 Business Days).	
• NHORA National Treasurer Representative will contact the local WF Bank with the instructions for the meeting with the president and treasurer. (The goal is to accomplish offline and online access to the bank account).	
• Order Checks & Debit Card (5-7 Business Days) Use Chapter President or Treasurer Business Address.	
• All needs to be completed prior to the meeting for the soft launch (see below).	

Collateral & Material	
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To be ordered by the National Secretary on behalf of the Chapter (after the Seed Money has been deposited into the Chapter's bank account). All collateral materials are paid for Chapters Bank Account.

- Tri-fold Brochures with names of new & advisory board members
- Order Retractable Banner
- Name Badges
- Table Cloth
- Lapel Pins

NHORA National Secretary

II. SOFT LAUNCH OF CHAPTER

First Chapter BOD Meeting (In-Person or On-line) - RETREAT FORMAT RECOMMENDED

NHORA Chapter Development Committee

Agenda/Founding Documents

- Informal meeting (*first meeting*) with the National Chapter Development team
- Email NHORA By-Laws to all Chapter BODs
- Email NHORA Chapter Formation Guideline to all Chapter BODs
- Email/Review Templates & Resources
- Leadership Powerpoint Presentation
- Determine Annual Budget and Prepare Calendar of Events
- Discussion of Chapter Sponsorships
- Identify & Prepare Sponsorship Packets
- Receiving the Bank Statement (*Online or Hardcopy*)
- Completion of Financial Activity Report (FAR)
- NHORA Foundation Programs
 1. Road to Homeownership
 2. Agents For Change
- Set up acceptable forms of Payment that NHORA accepts:
 1. *PayPal*
 2. *Square*
 3. *Checks*
 4. *Cash*
 5. *Venmo*
- Emails assigned to Chapter BOD members
- Access to given to Google Drive and Club Express CRM

NHORA National President, Vice President, Treasurer, Secretary, Compliance Officer, and VA's

III. HARD LAUNCH OF CHAPTER

Training Chapter BOD's (In-person/Retreat, Zoom, or Video)

- Expectation of being a Board of Director (knowing the time commitment)
Membership, Sponsorship, RTHO, Agent For Change, Social Media & Marketing, Events and Technology
- Understanding Robert's Rule of Order - How To Conduct A Meeting
- Chapter to adhere to all National branding; type, font, size
- Secretary Functions
 1. *Uploading current BOD's applications to the chapter folder*
 2. *Minutes*
 2. *Agenda*
- Treasurer Functions (See above in Soft Launch)

NHORA Chapter Development Committee & RTHO

- Marketing & Social Media

<p><i>Obtaining Credentials (Facebook, Instagram, Canva and Club Express CRM)</i></p> <ul style="list-style-type: none"> NHORA Foundation <ul style="list-style-type: none"> <i>1. Road To Home Ownership Campaign</i> <i>2. Agent For Change</i> Membership Mixer/Installation Schedule Calendar of Events (To be Reviewed) <ul style="list-style-type: none"> <i>Naming of the Events</i> 	<p>NHORA Chapter Development Committee & RTHO</p>
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IV. CHAPTER INSTALLATION	
Things To Do Before the Installation	
<ul style="list-style-type: none"> Prepare a Budget Receive and Deposit Sponsorships Pick a Venue <ul style="list-style-type: none"> <i>1. Set Ticket Pricing</i> Begin Marketing & Social Media Campaign <ul style="list-style-type: none"> <i>1. Receive Retractable Banner and Marketing material (see Collateral Material)</i> <i>2. Eventbrite</i> <i>3. Facebook & Instagram</i> <i>4. Club Express Email Campaign</i> <i>5. NHORA.ORG Calendar Events</i> Set the Agenda <ul style="list-style-type: none"> <i>1. Brochure</i> <i>2. Oath Ceremony</i> <i>3. Event Speakers</i> <i>4. Auctions/Donations</i> <i>5. Entertainment</i> 	<p>NHORA National President and Treasurer</p>

V. CHAPTER MAINTENANCE & GROWTH (Post- Installation Event)	
Compliance	
Use of approved NHORA Brand Assets & Trademarks (in chapter formation guidelines)	<p>Compliance Officer</p>
Maintenance of Online Chapter Management tools and Social Media Accounts:	
<ul style="list-style-type: none"> Club Express Website Tools/database Event marketing Newsletter Membership directory Sponsorship directory Chapter Resources directory 	<p>NHORA National VA Marketing & Technology</p>

Social Media Account <ul style="list-style-type: none"> • Credentials • Facebook • LinkedIn • Instagram • Etc. 	NHORA National VA Marketing & Technology
Building Your Chapter Membership <ul style="list-style-type: none"> • Installation • Membership Drives • Membership Renewals • Mixers • Collaboration with Local Trade Associations (Association of Realtors®) • Collaboration with Minority Trade Organizations 	NHORA Chapter Development Team