

Association Business Model

Manage and govern the Association or Chamber like a business. Identify essential documents then transform them into systems. Develop smart practices. Consider the franchise business concept to support sustainability, transition and member service excellence¹.

Legal and Governing Documents	Primary ² Documents	Secondary Documents
Articles of Incorporate (state gov't)	Operating Manuals <ul style="list-style-type: none"> • Leadership – Board Book • Personnel/HR • Policies • Style/Communications Guide • Crisis/Business Continuity • Procedures/SOP 	Meetings <ul style="list-style-type: none"> • Rules of Order • Agenda Development • Recording Minutes
Bylaws (relationship to membership)	Insurance Coverages	Nomination and Election Processes
Filing Required (sales tax, corporate, registration marks, IP, etc.)	Audit, Review or Compilation (CPA)	Job Descriptions <ul style="list-style-type: none"> • Board • Staff
IRS Public Records <ul style="list-style-type: none"> • Letter of Determination • Non-Profit Application (1023/1024) • Form 990 Information Return 	Strategic Plan (3-5 years)	Program of Work (committee and staff metrics)
Minutes (safeguarded)	Annual Budget and Financial Reports	Succession Plan
Annual Meeting	Software Licenses	Sponsor Opportunity Menu
Membership Notices <ul style="list-style-type: none"> • Charitable Deductions • Lobbying Deductions 	Critical Policies <ul style="list-style-type: none"> • Antitrust Avoidance • Conflicts of Interest Disclosure • Record Retention/Doc. Destruction • Financial Audits • Whistleblower • Public Record Requests • Confidentiality – Apparent Authority 	Chapter Guidelines <ul style="list-style-type: none"> • Programs • Operations • Filings/Reports
Brand Strength <ul style="list-style-type: none"> • Mission • Vision • Values 	Affiliation Agreements – Parent/Chapter	Committees and Task Forces <ul style="list-style-type: none"> • Purpose Statements • Current Charges • Reporting Mechanisms
Orientation Processes <ul style="list-style-type: none"> • Boards • Committees • Professional Staff 	Subsidiary Agreements – Foundation 501c3, PAC, For-Profit Corp.	
	Volunteer Commitment Form	

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Operating Framework 9-22

¹ Suggest one sentence **quotes and citations referencing to E-Myth and Traction**.

² Indication of “primary” and “secondary” refers to the order in which the documents and systems are likely to have impact. It does not mean secondary documents are less important than the primary or legal documents.