TO DO'S – Stage #2
Leadership Team Training to Chapter Launch

Before beginning to offer ACAP programs, there are lots of decisions to be made and things to do. After your chapter's infrastructure is in place, you will begin to develop programs. To put the process in context, we are beginning with the Community Conversation, possibly one of the first contacts Leadership Team members have with ACAP. The following is a matrix of general "to do's" to establish and launch your chapter, along with the team responsible for leading discussions, decisions, and activities for each.

Matrix Key *(Team that will coordinate the activity)*

Coord: Chapter Coordinator(s)   Mktg: Marketing Liaison Team   Spon: Sponsorship Team   Ven: Venue/Hospitality Team
Fin: Chapter Finance Team   Prog: Programming Team   Tech: Technology Team

Leadership Team (LT) Training – Pre-Work and Training Session

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
PRE-WORK									
X	X	X	X	X	X	X	• LT training is scheduled • LT members do training pre-work – review Chapter Guide Sections #1, 2, & 4 as well as 5 (Curriculum)	• Provide LT pre-work, Chapter Guide & Curriculum • Info re new chapter is given to digital marketing for web announcement & setting up chapter web page, email, & social media	• LT training schedule finalized • Chapter Guide & curriculum provided by ACAPcommunity • Chapter web page, email, social media framework set up by ACAPcommunity
LEADERSHIP TEAM TRAINING									
X	X	X	X	X	X	X	• Participate in LT training • Review chapter MOA • Determine dates/times for LT meetings o 2x/mo for months #1-2, then 1x/mo thereafter	• Conduct LT training • Encourage beginning of collecting contact info for 3 email audiences: (1) prospective attendees, (2) media, (3) senior services	• LT training conducted • Email lists begun for 3 email audiences • LT meeting dates/times set

							• Begin gathering contact information for 3 email audiences: (1) prospective attendees, (2) media, (3) senior services organizations, HR offices, faith communities, etc. ○ Share via Media Contacts for ACAP Chapters form	organizations, HR offices, faith communities, etc.	

After Leadership Team Training: Begin Leadership Team Meetings

PRE-WORK: LT MEETING #1									
Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Attend one ACAP program or watch one ACAP program video via ACAP website o For upcoming programs & videos, visit ACAP website o Recommendation: Attend 2-3 virtual programs or view videos from 2-3 programs • LT begins sharing ACAP with personal & professional networks		All LT members attend one ACAP program or view one ACAP program video
X							• Send ACAPcommunity a list of LT member names, email, employer & preferred name for name badge • Review Program Submission form to become familiar with form • Provide initial Core & Chapter Sponsor name, logo & URL to ACAPcommunity	• Collect LT, Core & Chapter sponsor info • Add new chapter welcome to ACAP website	• Start-Up Kit info begins being collected • New chapter welcome on ACAPcommunity website • Initial Core & Sponsor name, logo & URL to ACAPcommunity
	X						• Set up spreadsheet for income & expenses		

							• Review Program Submission form to become familiar with Finance Team role		
		X					• Begin identifying & collecting contact info for 3 email audiences (1) potential attendees, (2) local media, (3) senior services, businesses, agencies& organizations, faith communities, HR offices, etc. to help publicize programs • Share via Media Contacts for ACAP Chapters form		
			X				• Prepare recommendation for initial 6 programs • Review Program Submission Form to become familiar with Programming Team role		
				X			• Develop Program Sponsorship detail recommendations & begin listing possible Program Sponsors • Review Program Submission Form to become familiar with Sponsorship Team role		Program sponsorship format & beginning to identify Program Sponsors
					X		• Review pre-program slide deck in preparation for chapter personalization	Provide access to pre-program slide deck	Pre-program slide deck provided

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
						X	• With input from other LT members, visit & compare possible venues per ACAP guidelines & prepare recommendations for (1) venue & (2) program day/time		

LT MEETING #1

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point

X	X	X	X	X	X	X	• Conduct/participate in LT meeting #1
							  o Finalize chapter name & footprint
							  o Determine launch month
							  o Determine initial 6 programs (from 8 provided)
							    ▪ Collect input re. speakers from LT
							  o Finalize venue & date/time for programs
							  o Determine Program Sponsorship fee & details
								Attend LT meeting & provide coaching as needed	• Chapter name
									• Footprint
									• Launch date
									• Initial 6 programs determined
									• Program Sponsorship fee structure
									• Program venue finalized
									• Program date/time finalized

PRE-WORK: LT MEETING #2

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Attend one ACAP program or watch one ACAP program video		

X							• Send Start-Up Kit info to ACAPcommunity:
							  o Chapter name
							  o Program day/time
							  o Venue name & street address
							  o Chapter phone number
							  o Core, Chapter, etc. sponsor name, logo, URL
							  o Local photos for rack cards		

X	X						• After finalizing chapter name & receiving DBA, EIN, & W9 from ACAPcommunity, establish chapter checking account, PO box, and chapter phone number	• Secure chapter DBA, EIN, & W9 & send to Chapter Coordinator • Send finalized chapter MOA	• DBA, EIN, & W9 • Checking account • PO Box • Phone number
	X						• Develop chapter budget	• When banking is established, return chapter sponsorship fees over $5,000	• Funding over $5,000 returned to chapter
				X			• Continue identifying Program Sponsorship possibilities		• Increase list of potential Program Sponsors
		X					• Continue identifying additional contacts for 3		

Coord	Fin	Mktg	Prog	Spon	Tech	Ven			
							email audiences & submit on Media & Organization Contacts spreadsheet		
			X				• Prepare final programs & speakers recommendations		
X	X	X	X	X	X	X	• Share ACAP with personal & professional networks • All LT members sign MOA	• Finalize & send chapter MOA	• MOA sent

LT MEETING #2									
Coord	**Fin**	**Mktg**	**Prog**	**Spon**	**Tech**	**Ven**	**Leadership Team To Do's**	**ACAPcommunity To Do's**	**Items to be finalized by this point**
X	X	X	X	X	X	X	• Conduct/participate in LT meeting #2	• Attend & provide coaching as needed	
			X				• Finalize initial 6 programs & speakers & complete Program Submission Forms		• Programs & speakers confirmed
				X			• Share updates regarding Program Sponsors		
X	X	X	X	X	X	X	• Approve budget • Determine need for additional Core & Chapter Sponsors & identify potential Program Sponsors •		• Chapter budget approved • Need for additional Core & Chapter sponsorships determined
X							• Finalize LT signatures on MOA & send to ACAPcommunity		

PRE-WORK: LT MEETING #3

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Attend one ACAP program or watch one ACAP program video • Send chapter MOA with signatures from all inaugural LT members	• Receive & file chapter MOA with signatures from all inaugural LT members • Launch chapter web page & social media • Order start-up kit when chapter name, footprint, venue, program meeting date/time, phone number, etc., are finalized	• Received signed chapter MOA • Program Submission form begun • Need for additional Core & Chapter sponsorships determined
	X		X				• Add program information to Program Submission form	• Launch chapter web page, Facebook Page, LinkedIn	• Chapter web page, Facebook page, LinkedIn site launched
	X						• Work with ACAPcommunity to establish chapter PayPal account	• Work with chapter to set up chapter PayPal account	• PayPal account established

				X			• Begin soliciting & securing Program Sponsors
							  o Allow Program Sponsors to select "their" program(s)
							  o Update Program Submission Form as sponsors are finalized		

					X		• Learn about StreamYard from online sources		
		X					• Begin participating in area resource fairs, as possible • Continue increasing contacts for 3 email audiences		
X	X	X	X	X	X	X	• Share chapter with personal & professional networks		

LT MEETING #3

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Conduct/participate in LT meeting #3	• Attend & provide coaching as needed	• Initial 6 programs & speakers finalized
				X			• Share updates on Program Sponsors &, if needed, additional Core and Chapter Sponsorships		

PRE-WORK: LT MEETING #4

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
				X			• Begin to finalize Program Sponsors		• Program Sponsors beginning to be finalized
		X					• Participate in area resource fairs, as possible • Continue increasing contacts for 3 email audiences		• Additional email contacts
X	X	X	X	X	X	X	• Share chapter with personal & professional networks		• ACAP shared with LT's personal & professional networks
					X		• Begin to personalize pre-program slide deck		• Pre-program slide deck personalized for chapter

LT MEETING #4

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Conduct/participate in LT meeting #4	• Attend & provide coaching as needed	

PRE-WORK: LT MEETING #5									
Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
		X					• Continue increasing contacts for 3 email audiences Participate in area resource fairs, as possible	• Receive additional stakeholder contact info	• Additional email contacts
X	X	X	X	X	X	X	• Continue sharing ACAP with personal & professional networks		

Begin Monthly Leadership Team Meetings (1+ Month Before Launch)

Coord	Fin	Mktg	Prog	Spon	Tech	Ven	Leadership Team To Do's	ACAPcommunity To Do's	Items to be finalized by this point
X	X	X	X	X	X	X	• Update programs, speakers, sponsors, etc. at each meeting		
		X					• Continue identifying additional stakeholders & submitting updates on appropriate forms		
X					X	X	• Attend StreamYard training with ACAP digital marketing team	• Conduct StreamYard training	• StreamYard training completed
X		X					• Collect ordered marketing materials	• Develop & send emails, press release, flyers to stakeholders • Send program flyers to LT • Mail balloons for launch	• Start-up kit pieces received • Launch publicity begun • Special invitations for launch sent
X							• Invite other LTs to launch		

							Task		
X		X			X		• Ensure all materials are ready for launch		
			X	X			• Follow up with speakers & sponsors	• Launch regular program emails	• Press release & flyers sent • Email cadence begun
		X					• Participate in area resource fairs, as possible • Continue increasing contacts for 3 email audiences Distribute flyers about launch		• Additional email contacts
X	X	X	X	X	X	X	• Determine roles for each LT member at launch		
X							• Ensure receipt of all start-up kit materials		• All Start-Up Kit materials received
X	X	X	X	X	X	X	• Share chapter with personal & professional networks • Distribute flyers about launch		• Chapter shared with personal & professional networks

Chapter Launch – **See Preparing for Monthly Programs and Items Needed at Programs. Also please remember that beginning with your launch month, your chapter begins participating in digital marketing fees along with other chapters and ACAPcommunity.**