

THE CHAPTER MEETING THAT “TICKS”

What makes a meeting "tick" and attract good attendance?

1. Interesting, well-planned and well-organized Chapter programs.
2. Attractive and informative meeting notices.
3. Meetings should be held on a regularly scheduled date and time.
4. Credit Union sponsorship of meetings and rotation of meeting place.
5. The business meeting should be concise and move quickly.
6. The main purpose of the meeting should be for the exchange of information and ideas of benefit to credit union leaders.
7. The type of meeting should vary, and a program developed of the greatest interest for all credit union people in the Chapter area.
8. The agenda should provide for a general discussion period.
 - a. Business and Educational Meeting.
 - b. Dinner Meeting with:
 1. A Speaker
 2. Panel
 3. Conference
 4. Speaker with a question and answer period
9. President or Chairperson should keep the meeting under control and moving as rapidly as possible.
10. Short social period either before or after the meeting.

QUESTIONS THAT HELP YOU PLAN EACH MEETING

Exactly what is the reason for this particular meeting?

1. Do we want to change knowledge, attitude, behavior, or skill?
2. Do we want to start some specific action?
3. Do we want to honor or recognize someone or something?
4. Do we want to entertain?
5. Do all concerned with preparing and presenting the meeting have the same understanding of why we are having it?

(Some of the biggest meeting flops result from planners being unsure of exactly why they're having the meeting and from those attending never being told why they are present and exactly what they are expected to gain as a result.)

Will the credit unions who attend really benefit from the meeting as we've planned it?

1. Will both the inexperienced and the experienced get something or be able to give something?
2. Will both the large and small credit unions find it worth the time and money?

Have all the officials of all the credit unions in the Chapter been informed?

1. Has a notice been mailed to each person at his home address?
2. Have telephone calls been made to follow up with certain persons (those who would be most likely to benefit from this particular meeting)?
3. Will there be personal follow-up by a few officials where convenient?
4. Does the notice tell: Where? Why? What? Who? How to get there if place is different? A promised time that the meeting will begin and end?

Has a good agenda been prepared and a copy sent to each program participant?

1. Invocation? Who?
2. Opening remarks? Who? Time?
3. Register of attendance? Who? How?
4. Each report, activity and transaction? Who? Time?
5. Closing time set?
6. All involved told they will be limited to the time specified?

(One or the best means of cutting attendance in the future is to allow the meeting to run overtime.)

Will reservations be needed?

1. Who will they be sent to?
2. What's the deadline?

Have all the necessary facilities been arranged?

1. Room engaged?
2. Cost determined?
3. Confirmation in writing?
4. Public address system set up if needed, and tested?
5. Sufficient chairs and tables already arranged? (Don't waste time later.)
6. Education aids needed?
7. Checked with instructor for his/her needs?
8. Light switches and electrical outlets located?
9. Extension cords?
10. Ashtrays?
11. Matches?
12. Heating, cooling and ventilation are available and operation understood?
13. Clean-up crew to square things away after it's over?

Will refreshments or a meal be served?

1. Menu selected?
2. Appropriate to religious requirements?
3. Simple?
4. Cost determined, including tax and tips?
5. Refreshment breaks planned?

Are special guests and instructors or speakers expected?

1. Who will meet these people?
2. Who will introduce them?
3. Names and titles pronounced correctly?
4. Biographical information assembled if needed and O.K.'d by the individuals?
5. Have reminders been sent 30 days in advance?
6. Have you followed up with a phone call?
7. Will special arrangements be made for out-of-town persons? Who will do it?

Will prizes or awards be ready if they are to be given out? (Time saving procedure)

Will you seek evaluation of this meeting from those attending? How?

PROGRAMMING DO'S AND DON'TS

Do –

1. CONSIDER THE CHAPTER AUDIENCE

There is a mix of management, staff, volunteers and guests. Chapter program topics should consider all audiences and try to appeal to all.

2. CONSIDER THE LENGTH OF TIME AVAILABLE

Most programs begin at around 7:00 PM. Topics that take more than a half hour will lose their effectiveness.

3. REMEMBER THAT ALL MEETING FACILITIES CANNOT HANDLE ALL AUDIO VISUAL NEEDS

When planning the program, it's important to match it with the facility. Talk-only programs require proper sound systems. A/V programs require a facility free of pillars and of adequate ceiling height. (10ft. minimum)

4. CONSIDER AUDIENCE INTERACTIVE PROGRAMS, IF POSSIBLE

Adults learn by doing. They receive programs better if all senses are employed in the program.

5. VARY THE SCHEDULE

Rather than the usual cocktail hour-dinner-meeting program format, consider changing the order or deleting one of these activities.

6. CONSIDER

- a. The forum where the topic is open discussion on a variety of topics.
- b. The panel where two or three subject experts give vignettes followed by discussion. Requirements: Individuals who can project their thoughts objectively; a facilitator; and appropriate sound system.
- c. A film on a related topic. Requirements: Proper facility; and appropriate equipment
- d. A skit to illustrate a problem or technique. Requirements: "Actors" Script; appropriate staging and sound systems.
- e. A lecture, which is the standard program format. Caution is given to present only a few main points. Requirements: A good public speaker; and appropriate sound system.
- f. The Buzz Session where each table is given a short time to solve a credit union problem. After discussion, a table chairperson makes a report. The reports are summarized on a flipchart. Requirements: A flipchart; and facilitator.

Don't -

1. HAVE PROGRAMS ON HIGHLY TECHNICAL TOPICS

Remember the audience and the time of day. "A mind can only absorb as much as the seat," is a learning phrase that is applicable.

2. DEAL WITH PROGRAMS THAT WILL IN SOME WAY BENEFIT ALL

This is far-reaching, but some topics have little credit union or personal development relevance. Don't do a program just to fill time.

USUAL REASONS GIVEN FOR NOT ATTENDING CHAPTER MEETINGS

1. Did not know about the meeting.
2. Unfriendly atmosphere.
3. Meeting uninteresting and not planned.
4. Topic not connected with the credit union.
5. Meeting scheduled in an undesirable neighborhood.
6. Small "clique" runs everything.
7. Feels that he/she is not wanted.
8. Too busy with other activities.
9. Too far to drive.
10. "Nothing in it for me."
11. Afraid that he/she will get a job.
12. Did not get a personal invitation.
13. Meetings run too long.
14. Tired of listening to lengthy and uninteresting reports.
15. Lack of enthusiasm on part of officers.
16. Credit union is too small.

IT IS YOUR JOB, AS A CHAPTER LEADER, TO ELIMINATE OR CORRECT AS MANY OF THE ABOVE REASONS AS POSSIBLE.

1. Be friendly.
2. Consider the other person in your plans.
3. Prepare for each meeting.
4. Bring two or more credit union people to each meeting.
5. Enthusiastically support the Chapter officers and programs.

PROPOSED PROGRAMS FOR _____
CHAPTER

FOR 20____ - 20____

DAY OF THE WEEK

_____ April _____, 20____

Subject: _____

Time: _____ Place: _____

_____ May _____, 20____

Subject: _____

Time: _____ Place: _____

_____ June _____, 20____

Subject: _____

Time: _____ Place: _____

_____ July _____, 20____

Subject: _____

Time: _____ Place: _____

_____ August _____, 20____

Subject: _____

Time: _____ Place: _____

_____ September _____, 20____

Subject: _____

Time: _____ Place: _____

_____ October _____, 20____

Subject: _____

Time: _____ Place: _____

_____ Credit Union Day Celebration

Subject: _____

Time: _____ Place: _____

PROPOSED PROGRAMS, CONTINUED

_____ November _____, 20____

Subject: _____

Time: _____ Place: _____

_____ December _____, 20____

Subject: _____

Time: _____ Place: _____

_____ January _____, 20____

Subject: _____

Time: _____ Place: _____

_____ February _____, 20____

Subject: _____

Time: _____ Place: _____

_____ March _____, 20____

Subject: _____

Time: _____ Place: _____

ALTERNATE PROGRAM

_____, 20____

Subject: _____

Time: _____ Place: _____

If any League speakers are used, contact the Member Services Division for confirmation of availability at least 60 days prior to meeting date.

MAKING ARRANGEMENTS FOR A SPEAKER

Arrangements for League speakers will be made, at your request, at your annual program planning meeting. Many of the points listed below will still apply, but if you are arranging for your own speakers, all of the points are important.

1. Designate one chapter officer to be the liaison to your speakers.
2. Invitation should be in writing. (If the initial contact is by phone, confirm in writing and request the speaker to confirm his/her acceptance, including subject, fee and expense, if any.)
3. Always call the speaker 2 - 3 days in advance of the meeting, as a reminder.

Be sure the speaker understands the following:

Objective of the meeting –

1. Specific topic on which they are speaking.
2. Amount of time they may take.
3. Time, location and date of meeting.
4. When they will be expected to arrive.
5. Make-up of the audience.
6. Occasion of the meeting.

By phone or letter, ask your speaker if any special equipment is needed for the program, such as chalkboard, display table, flipchart, audio/visual, podium, etc.

1. Arrange for it to be there before the business meeting.
2. It should be set up and ready to go.
3. If speaker uses a stage, don't dim house lights.
4. Natural light should come from left or right.

Remember –

1. Room should be properly ventilated and heated.
2. Avoid empty seats up front. (good place for chapter officers)
3. Have officers join membership in audience for the presentation.
4. Only the President should remain at the table.
5. A smoother program always results when you go directly from the business meeting to the program of the day.
6. Arrange to meet and greet the speaker. (If the speaker doesn't arrive before the business meeting begins, ask a committee member to wait outside to meet him/her.)
7. Send copy of program to speakers or leaders.

INTRODUCING A SPEAKER

Anyone who introduces a speaker should build a bridge between the speaker and the audience.

1. Strive to put the speaker at ease, and make him/her feel welcome.
2. Make the audience feel that what is to be said is important and of interest to them.
3. Let the audience know that the speaker is well qualified to deliver the message.

Important –

1. Have the speaker's name absolutely correct.
2. Be sure you have the speaker's correct title or position.
3. Know the subject of the speaker's talk.
4. Learn appropriate facts about the speaker.
5. An introduction should take 60 seconds, give or take 15 seconds.

Remember –

1. The time belongs to the speaker.
2. Express interest and importance of subject, but do not express your views on the subject.
3. Be careful not to upstage the speaker.
4. Beware of humor in an introduction.

TEN TIPS FOR EFFECTIVE PRESENTATIONS

1. Get right into the subject matter as quickly, boldly, dramatically, challengingly, and excitingly as possible. Don't bore the audience with unimportant material. They are there for one purpose only, and that is to learn about the topic as described in the program. Start off with a pledge. Start off with a bang. Start off with something that sets their minds immediately thinking of the many ways in which they are going to apply what you are about to tell them.
2. Within the first two minutes of your presentation, tell them *WHY* what you are going to say is important to them and *HOW* it is going to affect their operations. This will create a heightened level of interest and awareness. (i.e., I'm going to give you eight specific techniques for)
3. Be specific. Be concrete. Use numbers. Use examples. Make them understandable and tangible. Issue your disclaimers up front. Let them know what you're not going to do and tell them what liberties you are going to take with numbers and references.
4. Use a rapid-fire pace. Don't belabor, linger, or dwell. See how many helpful ideas you can give them in the time you are being allotted.
5. Stick to the time schedule as precisely as possible. Remember you are an after dinner speaker. So please dry run your material at least twice, and once the day before the program.
6. Be relevant for this audience. Use examples that are relevant for them and show them how and why you've selected them. When you provide a list of techniques, advantages, disadvantages -- ENUMERATE! Count them out from 1 - 18, 1 - 4, etc. Start out by saying "I will be giving you 18 quick ideas of how to....." and then count them out so they will know where you are at any point.
7. Look for audience participation and questions throughout. It will get you more heavily involved with your audience and them closer to you. You'll be more comfortable. They'll be more comfortable, and you'll be operating on their wavelength. Also, encourage questions and involvement early, but please keep your answers to the questions brief.
8. No commercials please! Your name, title and organization has been listed in the meeting notice. We will provide you with as much exposure as possible. We do this for you, so you can be positioned as professionally as possible in front of the audience. Please absolutely no commercials. Your best commercial is to deliver a relevant, timely session.
9. Spend time developing a relevant handout. It is greatly appreciated by attendees. It surely will augment your session and be a reminder of your effectiveness long after the program is over.
10. And, of course, the ultimate advice is to **Have Fun. Be bold. Love your audience** and they'll love you. Pour out your heart and soul in every technique and secret you know for helping this audience. In the long run, they will end up helping you.

Adapted from the American Society
of Association Executives

WHAT EVERY SPEAKER SHOULD KNOW ABOUT CREDIT UNIONS

Credit unions consider themselves **UNIQUE** among financial institutions, and credit union people are sensitive to the way certain things are said. Here are some tips to help you talk to your credit union audience in their own "language." By following these guidelines, you'll increase your own credibility with your audience and enhance their understanding of your message.

- 1. CREDIT UNIONS ARE ORGANIZATIONS OR PEOPLE, NOT OF DOLLARS.**
These people are **MEMBERS**, not "customers" or "clients." Only **MEMBERS** can save at a credit union and only **MEMBERS** can borrow. If there's one thing that will "turn off" a credit union audience, it's to refer to their **MEMBERS** as "customers." Call them **MEMBERS**. . . always.
- 2. CREDIT UNIONS ARE JUST THAT - CREDIT UNIONS.**
They're not "unions," nor are they "credit associations." It's important to use both words every time -- **CREDIT UNION** -- with a slight emphasis on the first word.
- 3. CREDIT UNIONS ARE COOPERATIVES, ORGANIZED ALONG DEMOCRATIC PRINCIPLES.**
The **MEMBERS** are the **OWNERS** of the credit union. Each **MEMBER** has one vote in organizational affairs, such as election of directors, no matter how many dollars he or she has in savings. Every credit union has a defined **FIELD OF MEMBERSHIP**, or "**COMMON BOND**." Only people within that field of membership can join the credit union and use its services.
- 4. THE ELECTED BOARD OF DIRECTORS OF EACH CREDIT UNION ARE VOLUNTEERS.**
By law, they **CANNOT** be paid for their services; they are ultimately responsible for all areas of the credit union and its operation.
- 5. THE CREDIT UNION BOARD ELECTS, A CHAIRPERSON TO PRESIDE OVER THE MEETINGS, A VICE CHAIRPERSON, A SECRETARY AND A TREASURER.**
They also appoint a **PRESIDENT** as the chief operating or financial officer. The President takes charge of the daily operation of the credit union.
- 6. CREDIT UNIONS ARE PART OF A MOVEMENT, NOT AN "INDUSTRY."**
They have a distinct social purpose, and they take this responsibility seriously. Their purpose is to help their members improve their economic lives through cooperative thrift and the wise use of financial resources.
- 7. CREDIT UNIONS ARE AFFILIATED IN A NATIONAL SYSTEM KNOWN GENERICALLY AS THE "ORGANIZED CREDIT UNION MOVEMENT."**

It consists of local CHAPTERS, formed for social and educational purposes; state LEAGUES that provide trade association services on the state level; and the Credit Union National Association, or CUNA (pronounced Qu-nah), the national trade association. Credit Unions are members of Leagues and Leagues are members of CUNA. At the state and national level, for-profit subsidiaries of the Leagues and CUNA provide a variety of financial and other products and services for credit unions.

8. **CREDIT UNIONS RANGE IN SIZE FROM A FEW HUNDRED MEMBERS AND FEW THOUSAND DOLLARS IN ASSETS, TO SEVERAL HUNDRED THOUSAND MEMBERS AND SEVERAL BILLION IN ASSETS.**

Their services range from "plain vanilla" share savings and personal loans, to the state of the art in financial services. The one thing they all share in common is their focus on SERVICE to the member.

9. **OVER THE YEARS, CREDIT UNIONS HAVE USED SEVERAL SLOGANS:**

1. "Not for Profit, Not for Charity, But for Service"
2. "Join Your Credit Union -- Its Where You Belong"
3. "People Helping People"