

NAPO-DC
CHAPTER POLICIES AND PROCEDURES MANUAL

NAPO-WDC Chapter Policies & Procedures

Each NAPO Chapter must have a set of Policies and Procedures. Policies and Procedures are specific to each Chapter and assist the Board in managing Chapter business. This manual must conform to, and not conflict with, the NAPO Bylaws, Chapter ByLaws , the Chapter Affiliation Agreement and the NAPO Chapter Operations Handbook. However, the Chapter Policies and Procedures do not need to repeat these documents.

Changes to Chapter Policies and Procedures do not require approval of the NAPO Board of Directors. Although, a current copy of the Policies and Procedure Manual should be forwarded to NAPO Headquarters at the end of each fiscal year. The Secretary is responsible for keeping a working copy of the Chapter Policies and Procedures Manual throughout the year. BOD Members can suggest changes/additions to the manual by sending them to the Secretary. The BOD is to review the changes to the working copy and vote on all changes during the last full month of the BOD year (April). Upon passage, this becomes the current Policies and Procedures Manual and a new working copy is begun. The Chapter operates using the existing manual, not the working copy.

Chapter Name & History

The name of the Chapter, as stated in the Chapter’s Articles of Incorporation, is Washington, D.C. Metro Chapter of NAPO. Our “nickname” is NAPO-WDC. The Chapter became official in September 1994 with 19 members.

Mailing Address & Telephone

NAPO-WDC
PO Box 7301
Arlington, VA 22207-0301
(240) 883-6434

Website

www.dccorganizers.org

Chapter Mission Statement

“To develop, lead, and promote NAPO-WDC professional organizers and productivity specialists through networking and educational opportunities”

Chapter Slogan

“A Community of Organizing and Productivity Specialists”

ANTITRUST LAWS

NAPO requires that all Chapters adopt and adhere to the Board-approved NAPO Antitrust Compliance Policy.
http://c.ymcdn.com/sites/www.napo.net/resource/resmgr/docs/NAPO_Antitrust_Compliance_Fu.pdf?hhSearchTerms=%22Sherman+and+act%22

NAPO® Code of Ethics

Chapter members must adhere to the NAPO Code of Ethics http://www.napo.net/?page=about_ethics

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BOARD OF DIRECTORS

The Chapter is governed by a volunteer Board of Directors (BOD). The BOD is responsible for the supervision, control and direction of the affairs of the Chapter. The BOD serves the Chapter by:

- Establishing a strategic plan for NAPO-WDC
- Determining annual goals, programs, and special events
- Maintaining the good standing and fiscal well-being of the Chapter
- Increasing public awareness of the value of professional organizers

STRUCTURE

The Chapter is required to have the following Officer Positions: President, Secretary and Treasurer. These three (3) positions make up the **Executive Board**. The Offices of Vice President, President Elect and Immediate Past President are optional, as are the Director of Administration, Marketing, Membership, Programs and Professional Development, Communications & Technology, Business Partners and Director at Large (in absence of an Immediate Past President). These positions make up the **General Board**.

TERM

The service term for the BOD and other leadership positions runs from May 15 to May 14.

RESPONSIBILITIES

- Shall maintain the good standing of the Chapter
- Shall be subject to the provisions and limitations of all applicable laws, the Bylaws of NAPO, the Chapter Bylaws, the Chapter Affiliation Agreement, and the Chapter Operations Handbook.
- Shall perform duties as may be prescribed in the NAPO-WDC Policies and Procedures Manual
- Shall act in the best interest of the association only
- Shall not use the position to benefit themselves or their business.
- Shall avoid self-dealing and conflict-of-interest situations
- Shall act collectively with the BOD.
- Shall not have any power or authority to act on behalf of the Chapter unless specifically authorized and empowered by the BOD to so act.

GENERAL DUTIES

- Adopt programs to carry out NAPO-WDC's mission
- Establish personal goals and objectives for length of service
- Prepare for each BOD Meeting by submitting a Board Report, reviewing the meeting agenda
- Attend all BOD Retreats, BOD Meetings and General Membership Meetings
- Participate effectively in the BOD Meetings by voicing opinions
- Support BOD actions publicly
- Support NAPO-WDC activities by participating
- Fulfill any assignments as a committee member, BOD liaison, or representative of NAPO-WDC
- Conduct themselves professionally in manner and appearance when representing NAPO-WDC
- As an outgoing BOD Member, participate in transition activities for a newly elected Board position such as by attending the April and May BOD Meeting with all current incoming BOD Members
- Perform such other duties as requested, delegated, and/or deemed necessary by the President.

COMMUNICATION

All BOD emails are routed through the NAPO-WDC Google Group napo-wdc-bod@googlegroups.com

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BOARD MEETINGS

Frequency

The BOD Meetings are required to be scheduled monthly. Traditionally, meetings are held on the first Monday of every month from September through June, at designated location(s) unless other arrangements have been made. Meetings for the months of July and August are at the discretion of the BOD, and are generally held for BOD Retreats. Any two members of the BOD may call a meeting for a specific purpose. No other business shall be conducted at that meeting. Three days notice must be given to all BOD Members.

Time & Location

The BOD determines the day/time of the BOD Meetings. Meetings are currently held prior to the Chapter Meetings 4:30pm – 6:00pm. Dinner is provided at the Chapter's expense. Arrangements are agreed upon by the BOD.

Attendance

Attendance is mandatory for all BOD Members. Excusable absences are sickness, emergency, inclement weather, and travel. BOD Members must notify the President of absences and submit their written report prior to the meeting. At any BOD Meeting, the majority of the BOD Members must be present to constitute a quorum for voting purposes. Members of NAPO-WDC may attend the BOD Meetings by contacting the President one-week before the meeting.

Meeting Structure

The President will develop the meeting agenda and distribute it one week in advance. There will be a set time for convening and adjourning the meeting. Meeting will follow Robert's Rules of Order. Complete respect will be given to each speaker at all times. Decisions will be made for the best interest of the group and not on individual preference.

Financial Review

The BOD shall examine the financial records at each BOD Meeting. At the end of each fiscal year, a detailed financial report shall be forwarded to NAPO headquarters by November 15. If NAPO-WDC does not meet the deadline, they are not included in NAPO's group tax return and will not receive General Liability and Directors and Officers liability insurance from NAPO.

Executive Decisions

Issues that need to be approved or acted upon between BOD Meetings may be approved by a two-thirds (2/3) vote of the Executive Board. The Secretary will inform members of the General Board of the action, in writing, within one week of the decision. When discretion and/or confidentiality are necessary, the President or Executive Board may resolve issues arising within the membership without involving the General Board.

Reporting

BOD Members submit reports via the BOD Report Google Form. These individual reports drop into a spreadsheet that the President uses to prepare the agenda for the next BOD Meeting. Reports should be as clear and concise as possible and any file attachments referenced. Request for Action (RFA) proposals must include: who, what, when, where, why and budget and are presented as a discussion item at least one week prior to the BOD Meeting so all have a chance to comment. Any necessary attachments to RFAs must be posted on the Google Group and referenced. In the case of a last minute emergency, a verbal report can be given to the President or a member of the Executive Committee no later than the day of the meeting.

Minutes & Agendas

The President prepares the agenda at least one week in advance of the next BOD Meeting. BOD Meeting minutes are distributed by the Secretary to BOD Members at least one week before BOD Meeting for approval by meeting participants. Approved meeting minutes are saved to the BOD Dropbox account in PDF format and are sent to NAPO Headquarters on a quarterly basis by the Secretary. Reporting dates are within thirty (30) days after the end of

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each of the first three fiscal quarters (quarters ending December 31, March 31 and June 30) and forty-five (45) days after the September 30 fiscal year end.

RETREAT

The BOD Retreat provides the incoming BOD with an opportunity to share their ideas and goals for NAPO-WDC, move forward through the strategic planning process, and inspire responsibility, unity and teamwork. This allows the BOD an opportunity to become a cohesive group and have adequate time to plan for the upcoming membership year. It is attended by the newly elected BOD and invited guests. Each BOD can determine the time, location, and duration of the BOD Retreat. It is advisable to meet a full day in July or August. Preparation or follow up to retreat business may be addressed in a virtual meeting, ideally within 2 weeks of the Retreat. Follow up meetings will be scheduled in advance of the Retreat. Minutes are sent to NAPO Headquarters by the Secretary.

ANNUAL BUDGET

The annual budget is established during the BOD Retreat. BOD members cost out their required actions over the term. This budget should include projected income and expenses for all BOD positions. The overall budget is presented to the Treasurer by August 1 of each year. Budget must be approved by the BOD by September 30 for implementation the following fiscal year beginning October 1. For other BOD and NAPO-WDC fiscal policies see Article VIII of the Chapter Bylaws.

REIMBURSEMENTS

BOD members may submit for reimbursements as needed and as provided for in the budget.

The BOD must approve any expenditure of NAPO-WDC funds. The committee chairperson must approve any expenditure by committee members. Reimbursement requests should be submitted to the Treasurer within 45 days of the expenditure using the Reimbursement Form (which is under the members only tab on the website). with the corresponding receipt(s) attached. Treasurer approves reimbursement requests under \$100.00. If over \$100.00 an Executive Board member must approve (not Treasurer).

Each year, during budget negotiations, the BOD will discuss and vote on the feasibility of reimbursing regular expenses incurred by the BOD including but not exclusive of: dinner served during Board Meetings and membership dues for all BOD Members after completing a year of service.

Immediate past BOD Members receive free membership renewal for the year immediately following their year of service. To qualify as a year of service, they must be on the BOD by May 15 and complete the year of service through the next May 15.

At the end of a year of service (April/May timeframe) the full BOD may consider any BOD Member who does not meet these requirements, as to whether they should qualify for this benefit, with only one person per BOD position using this benefit per year. BOD Members are not eligible to earn compensation from NAPO WDC for time spent during their year of service on the BOD. If partial years are served, extenuating circumstances may pro-rate membership reimbursement.

The incoming President and Vice President are encouraged to go to the NAPO National Conference and Leadership Forum to represent the Chapter. The incoming President and Vice President will have their conference registration reimbursed by the Chapter, aligning with the budget, after the full term has been served.

The incoming President is expected to attend both parts of the Leadership Forum. If the incoming President or Vice President does not attend the conference, it is the responsibility of the incoming President to offer the

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reimbursement to another BOD member, with selection preference weighted toward anyone who attended the leadership forum.

AUTHORIZED SIGNATORIES POLICY

Chapter Officers should be the only authorized signatories.

CONTRACTS

Only the President has the authority to sign contracts on behalf of NAPO-WDC with the exception of the Professional Development/Program Director, who may sign a meeting location contract. All completed contracts must be forwarded to the President for review prior to signing. The President and Treasurer keep copies of all completed contracts and one resides on the NAPO-WDC BOD DropBox account.

GRIEVANCES

If any person, NAPO-WDC member or otherwise, has a grievance about any member of the BOD or NAPO-WDC operations, a written complaint may be filed with the President. If the President cannot resolve the issue, he/she will form a Grievance Task Force to address the issue.

PROPERTY AND INVENTORY

All files pertinent to a particular BOD position are property of NAPO-WDC. All equipment, office supplies, paper supplies, utensils, and appliances received in conjunction with a particular BOD or committee position are the sole property of NAPO-WDC. Materials must be returned to the Immediate Past President or passed on to immediate BOD or committee successor at the end of a term. The Secretary maintains the list of inventory owned by NAPO-WDC.

BOARD ELECTIONS

The Immediate Past President (or Director-at-Large) shall chair the Nominating Committee and oversee the nomination process. The Committee shall include a current BOD Member and at least one regular NAPO-WDC Chapter member. It is not recommended that the President serve on the Nominating Committee.

First call for nominations begins in January. A NAPO-WDC Chapter member wishing to be on the BOD will be given a written description of the specific BOD position's duties. The member must have a full understanding of the responsibilities of being a BOD Member before placing his/her name for nomination.

Requirements

All NAPO-WDC Chapter members in good standing with NAPO National and NAPO WDC may offer him/herself as a candidate. No one shall be nominated without his/her express permission. Nominees for President shall have been a member of NAPO-WDC for at least one (1) year prior to the election meeting and it is strongly recommended the candidate have previous NAPO-WDC BOD experience. Nominees for Vice President shall have been members of NAPO-WDC for at least six (6) months prior to the election meeting.

Elections

The election of new officers is held in March. The Immediate Past President / Director At Large is responsible for the legal voting process.

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Orientation

Outgoing BOD Members shall meet with their successors in May and prior to the BOD Retreat(s). It is the responsibility of each outgoing BOD Member to forward to his/her successor updated job-specific procedures, materials, and documentation, historical or otherwise. It is also the BODMembers' responsibility to be sure the successors have a clear understanding of the position duties, responsibilities and timelines.

Resignation/Removal

If a vacancy occurs in any officer or director position, the President (or Vice President if the vacancy is in the office of the President) shall recommend an individual who meets the qualifications for the position to fill the unexpired term. The person shall be appointed to the position upon approval of the recommendation by the BOD. If the BOD does not approve the recommendation, then the President (or the Vice President, if the vacancy is in the office of the President) will make another recommendation, and the process will continue until an appointment is made. If the appointment creates another vacancy in any officer or director position, then this process will be repeated until all vacancies are filled. If the vacancy occurs in the office of Immediate Past President, the President should make every effort to recommend a former Past President or NAPO-WDC BOD Member to fill the unexpired term. If a former NAPO-WDC BOD Member is appointed, the position will be named Director At Large for the duration of that term.

Notification

The Secretary is responsible for updating NAPO National and the Chapter President of any change of BOD Members. The Secretary sends the roster to the BOD and all committee chairs as well as to the NAPO National. The list is updated when necessary.

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MEMBERSHIP

DEVELOPMENT AND EDUCATION BENEFITS

NAPO-WDC offers educational opportunities to help members become more experienced, knowledgeable, and competitive:

- Chapter Meetings held 10 months (September-June); no fee for members
- Ask The Expert program available to new members offering professional support from chapter Golden Circle members
- Voting privileges at Chapter Meetings and feedback through chapter surveys
- Access to information/documents from prior meetings on the chapter website

PROFESSIONAL RESOURCES

NAPO-WDC provides resources and services geared toward professional growth and development:

- Listing in "Find a Pro" on the chapter website to attract prospective clients
- Link to your website from your listing
- Access to enhanced online listing including photo, specialties and affiliations
- Participation in the NAPO-WDC POINT Discussion Group
- Increased professional credibility; utilize chapter logos for marketing materials
- Access to "Members Only" website for additional resources (book list, reference and meeting materials)
- Access to chapter library of recordings of past annual NAPO, MARCPO, and ICD conferences
- Access to chapter book club meetings
- Access to Neighborhood groups for small group networking
- Access to Mentor Program
- Media exposure through NAPO-WDC chapter events, promotions and electronic media

NETWORKING AND MARKETING

NAPO-WDC recognizes the importance of interacting with and learning from the leaders in the organizing industry:

- Access to the NAPO-WDC membership database
- Meet and work with NAPO-WDC Business Partners to benefit your clients
- Eligible to volunteer for BOD role, committees, task forces or other opportunities that provide professional development, experience, and business exposure
- Increased SEO (Search Engine Optimization) ranking with reciprocal links from your business website to the chapter website (www.dccorganizers.org)

- Participate in cooperative marketing and chapter PR efforts through service projects, promotions and events
- Post instructional videos on Chapter Video account and write articles for chapter blog
- Display your marketing materials (classes, products, services) at monthly Chapter Meetings and include events on events of interest online calendar
- Follow the NAPO-WDC Chapter on Twitter: <http://twitter.com/napowdc>
- Track postings on the NAPO-WDC Chapter YouTube Channel: <http://www.youtube.com/napowdc>
- Join the NAPO-WDC Facebook page: <http://www.facebook.com/napowdc>
- Follow the NAPO-WDC LinkedIn page: <https://www.linkedin.com/company/napo-wdc>
- Follow the NAPO-WDC Instagram page: https://www.instagram.com/napo_wdc/

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CATEGORIES & FEES

Professional and Provisional Member - An active Provisional or Professional Member of NAPO has voting rights and is eligible to hold office.

- \$165 per year

Professional and Provisional Member (Non-local/Affiliate) - An active Provisional or Professional Member NAPO who resides 100 or more miles from the U.S. Capitol. Have voting rights but cannot hold office.

- \$120 per membership year

Multi Person Members

- 1st membership is \$100, each additional membership from the same company is \$85

Student Member

- \$20 per membership year

Allied Member

- \$150 per membership year

Retired Member - An individual, representing her/himself or a company, who has retired from employment in the field of professional organizing services. An Emeritus Member must qualify under NAPO rules of at least 55 years of age and a NAPO member for a total of 15 consecutive years.

- \$35 per membership year

Business Partner (BP) Member- shall be a nationally-based or locally-based company that is engaged primarily in the manufacture, distribution, and/or sales of organizational equipment, supplies, or organizing-industry-related services. Each BP shall designate one person as its representative to the Chapter. If BPs want to bring an additional representative regularly, they should join as a Business Colleague. BPs have voting rights and are eligible to hold office as defined in the by-laws.. The NAPO-WDC BOD reserves the right to limit the number of BP's in any one service industry to three.

- \$275 per membership year

Business Partner's Colleague shall be an additional employee of the BP. Have no voting rights except in regard to the election of the Director of BP's and are eligible to hold office as Director of BP's.

- \$75 per membership year

Processing Fees The processing fee for new members and late and/or lapsed memberships is \$25. Membership renewals received more than 15 days after the renewal date will be considered lapsed. If the fee is not included with the renewal application and dues, the member will be notified and the application held pending the receipt of the fee.'

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NEW MEMBERSHIP

- Must complete the Chapter Membership Application Form found on the NAPO-WDC website (www.dccorganizers.org) and submit it electronically, mail or bring to Chapter Meeting with payment.
- New members of NAPO-WDC will receive a Membership Packet via email upon joining the chapter consisting of the Chapter Bylaws, Chapter Policies & Procedure Manual and other useful information.

MEMBERSHIP RENEWAL In order to maintain NAPO WDC membership, members must renew annually and maintain a current NAPO National Membership.

- Membership renewal dues for current NAPO-WDC members are collected annually on members' anniversary date.
- Membership renewals received 7 days after the renewal date will be considered lapsed. Lapsed members will need to reapply for membership, a \$25 processing fee will be assessed like they are a new member, and the start date of membership will reset.
- Information regarding membership renewal should appear in September on the Chapter's website
- All members will be notified to renew via email beginning the month before renewal.

Updates of NAPO National members in the NAPO-WDC area are received monthly from NAPO National. NAPO-WDC membership will be void if you do not retain membership in NAPO National with no refund of chapter dues. Membership will be void until confirmation is received in one of two ways: confirmation from NAPO National or proof of payment to NAPO National. Chapter membership does not get extended by the amount of time membership was suspended. A \$25 processing fee will be assessed to reinstate NAPO-WDC membership.

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GENERAL OPERATIONS

MAILING ADDRESS, TELEPHONE, & EMAIL

The Chapter must have a stable mailing address. A post office box is recommended. A designated member is responsible for picking up the NAPO-WDC mail on a weekly basis and distributing it to the responsible parties. The NAPO-WDC telephone number is intended for external use only. The Vice President is responsible for answering and maintaining the voice mailbox as well as answering the general info@dcorganizers.org email.

CHAPTER DIRECTORY

The Chapter Membership Directory is available online in the "Members Only" section of the NAPO-WDC website. The directory is for internal use only and is not to be sold or distributed to anyone outside NAPO-WDC except NAPO National. NAPO-WDC members who wish to contact other NAPO-WDC members should use the NAPO-WDC Membership Directory.

DATABASE

The database information is the sole property of and for the sole use of NAPO-WDC. The lists in Constant Contact and Wild Apricot contain the membership (regular and BPs), individuals interested in the profession, guest speakers, and other NAPO National members in the NAPO-WDC area. The Director of Membership and Vice President maintain the lists and clean them up annually.

CHAPTER WEBSITE

The NAPO-WDC website is a source of information about the industry, members, and upcoming events. The Chapter Membership Directory is available online in the "Members Only" section of the NAPO-WDC website. The organizer listings on our website are there to benefit all of our members and any unfair, illegal, inappropriate, untruthful or distorted verbiage in favor of a single member is prohibited.

COMMUNICATIONS

The President or her/his designee shall serve as the official spokesperson for NAPO-WDC. Any communication, written or verbal, must be reviewed through the appropriate Board Members before it is sent. In absence of the President, Vice President reviews, and in the absence of the VP the Secretary reviews. The BOD currently stores all of the Chapter's final files in Dropbox (www.DropBox.com) and Google Drive is used for working files, board reports, and website features. You must use the chapter accounts to access Dropbox and Google Drive. Phone calls and emails should be acknowledged with a response within two business days. BOD members should use their BOD email when communicating for the chapter and signing up for accounts.

GRIEVANCES If any person, NAPO member or otherwise, has a grievance about the NAPO-WDC BOD, committee chairperson, or chapter operations, a written complaint may be filed with the President. If the President cannot resolve the issue, he/she will take the issue to the Grievance Task Force he/she creates. For further information see "Grievances" under Committees.

ONLINE DISCUSSION GROUP <http://point.napo.net/useragreement>

CHAPTER MEETINGS FREQUENCY & TIME Meetings are held the first Monday of every month from 7:00 p.m. to 9:00 p.m. Registration begins at 6:30 p.m. Networking and the "Ask the Expert" focus group begins at 6:30 and ends at 6:55 p.m. The meeting begins at 7:00 p.m. and includes an educational program, chapter business meeting and networking. If a holiday falls on the first Monday, the meeting is moved to the second Monday of the month. Meetings are not held during the months of July and August.

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Meeting Location

The Director of Programs & Professional Development is responsible for contracts and arrangements for the meeting site(s).

Cancellation

During inclement weather, NAPO-WDC will follow the School System closings for the meeting location. In the case of chapter meetings, instead of cancelling, the meeting will take place virtually unless there are power loss issues for those conducting the meeting.

Guests

Non-members may attend the Chapter Meetings. The fee is \$25 per meeting. The \$25 fee may be applied toward membership if the guest signs up during the month of the meeting.

Attire

Professional attire is encouraged at all NAPO-WDC Chapter Meetings.

Name Tags

Director of Membership orders the nametags for all new members. Members are responsible for turning in their name tags to Membership after each meeting.

Ask The Expert Table Golden Circle members host the "Ask the Expert" sessions at the Chapter Meetings. The Golden Circle Liaison creates a schedule and provides it to the Chapter Vice President.

Lending Library

The Lending Library maintains multiple copies of two (2) years of NAPO and MARCPO Conference recordings from 2013-2014 on the subject of organizing. Any member can check out inventory for two months at a time.

Partners and Promotions Table

The Partners and Promotions table gives members an opportunity to advertise within the chapter for free. The table is available for viewing before and after the meeting. Members may advertise upcoming seminars, products* they sell, or recruit other organizers. Advertisements should be in the form of a pamphlet, brochure or product sample. There will be no verbal selling permitted around the Partners and Promotions table. Members are responsible for collecting materials at the conclusion of the meeting or they will be discarded.

**If there are multiple products you would like to share, please provide a brochure of the products rather than the actual products. This will allow more members to benefit from the Partners and Promotions table. NAPO-WDC is not responsible for the safety or security of products placed at the Partners and Promotions table.*

Program Information Information on upcoming meetings and summaries of previous Chapter Meetings can be found on the website. Program feedback and ideas are always welcome from the membership and should be directed to the Director of Programs & Professional Development.

Speakers

Program speakers come from NAPO-WDC membership or from the general public. Speakers are encouraged to provide our Director of Programs & Professional Development with a biography for the website as well as a list of equipment needed for their presentation. They are given the opportunity to display products or services on the Partners and Promotions table and are allowed to promote their products before and after the conclusion of the meeting in which they are speaking. Guests of the speaker who are not assisting with the presentation must pay the guest fee for attending the meeting. Speakers are sent a thank you letter.

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CHAPTER BOOK CLUBS

The NAPO-WDC (Members Only) Book Clubs enable members to discuss books related to business and organizing and network with other members in an informal setting. Book Clubs meet at preselected locations. Upcoming Book Club meetings are publicized on Point, in the monthly e-newsletter, and at monthly Chapter Meetings.

CHAPTER PODCAST CLUB

The NAPO-WDC (Members Only) Podcast Club enables members to discuss podcasts related to business and organizing and network with other members in an informal setting. Book Clubs meet virtually. Upcoming Podcast Club meetings are publicized on Point, in the monthly e-newsletter, and at monthly Chapter Meetings.

CHAPTER NEIGHBORHOOD GROUP

The NAPO-WDC (Members Only) Neighborhood Groups enable members to discuss issues related to organizing and their businesses in an informal setting. Each group meets at preselected locations. Upcoming Neighborhood Group meetings are publicized on Point, in the monthly e-newsletter, and at monthly Chapter Meetings.

NAPO-WDC BLOG

The Blog is managed by the volunteer Blog Manager reporting to the Director of Communications and Technology, and is posted on the NAPO-WDC website (www.dcorganizers.org). The purpose of the NAPO-WDC blog is to enhance the chapter's web presence and public reach, publish news and current event information, and bring more awareness to NAPO, organizing and productivity principles, and the industry as a whole. Members wishing to contribute to the blog must adhere to the following guidelines:

- Affiliate links are not permitted.
- Original articles and reposts must be valuable content about organizing/productivity and not advertising/promoting an individual's business.
- Speaker articles related to organizing, productivity, and/or organizing/productivity businesses are acceptable and encouraged. Articles may be obtained from speakers for posting before (teaser to get members to attend the upcoming meeting) or after (recap for those who were not able to attend the last meeting) the Chapter Meeting in which they speak.
- The Blog Manager must receive approval to repost an article from another blog.
- All materials submitted must comply with the blog's purpose and the NAPO Code of Ethics.
- The Blog Manager and/or the NAPO-WDC BOD reserve the right to edit all copy. For clarification, edits may be discussed with the author prior to publishing.
- The blog is posted on the website for public viewing.

VOLUNTEERING

All members are encouraged to volunteer. The success of NAPO-WDC depends on contributions made by all of its members. Volunteer opportunities are listed on the website, in the e-newsletter, and announced at Chapter Meetings.

SPECIAL EVENTS & ACTIVITIES

The BOD plans special events and NAPO-WDC sponsored activities that provide members with opportunities to get involved with their profession, such as National Get Organized Month (GO Month) during January. There may be seminars and workshops sponsored by NAPO-WDC, BP's, and individual NAPO-WDC members.

NEW MEMBER BRUNCH

NAPO-WDC New Member Brunch provides new members with an opportunity to discuss the business of professional organizing and to network with representatives of the current BOD. The Director of Membership is in charge of scheduling a date and location.

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VOLUNTEER RECOGNITION

The NAPO-WDC BOD may choose to have a ceremony to honor member volunteers for their efforts.

BOARD OF DIRECTOR DUTIES

- All Directors are responsible for maintaining documentation and documents used for responsibilities in their respective folders in Dropbox for subsequent Boards and Directors to ensure the long term knowledge of the Board, as well as consistency and not having to redo things year-to-year. Consider sharing documents with other Directors in respective positions on POINT.

EXECUTIVE BOARD

PRESIDENT

Responsibilities

- Preside over NAPO-WDC Board Meetings, the annual BOD Retreat, and Chapter Meetings
- Prepare BOD and executive BOD Meeting agendas
- Monitor overall workings and activities of NAPO-WDC
- Motivate and support members in their respective positions
- Oversee activities of special task forces
- Serve as liaison to NAPO National and chapter Presidents
- Serve as NAPO-WDC representative to other organizations and to the general public
- Serve as ex-officio member of all committees
- Attend NAPO National conference and serve as the primary representative of NAPO-WDC
- Resolve member complaints
- In the event the Immediate Past President is unable or unwilling to serve, the President shall make every effort to recommend a former Past President or chapter BOD Member for the duration of the unexpired term as a Director At Large.
- Participate in monthly NAPO Presidents calls/virtual meetings
- Create and update Board Report Form and Spreadsheet monthly or supervise a volunteer who has agreed to do it

Reporting Board Members

- VP
- Secretary
- Treasurer
- Programming & Development
- Special Event Chairpersons

TREASURER

Responsibilities

- Responsible for the funds and finances of NAPO-WDC
- Prepare and forward to NAPO all financial reports as required by NAPO
- Obtain monthly reconciliation of the bank accounts for NAPO-WDC from the bookkeeper

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- Review and submit NAPO-WDC's financial reports at BOD Meetings
- Handle accounts payable and receivable
- Review and process reimbursement requests, maintaining a system to document approved disbursements
- Maintain NAPO-WDC bank account and serve as NAPO-WDC liaison to the bank
- Prepare a budget with assistance from NAPO-WDC officers and submit a proposed budget to the NAPO-WDC BOD for approval and implementation before October 1st
- Account for NAPO-WDC dues and meeting fees. Prepare and adjust electronic invoices, billing discounts, and refunds for chapter members and event participants as needed.
- Review contracts and/or agreements along with the negotiating BOD Member
- Monitor expenditures to maintain a financial balance, which maintains an appropriate reserve for the NAPO-WDC to sustain its activities
- Retain and maintain financial records in accordance with retention schedules
- Act as liaison for the audit volunteer and prepare documentation as necessary for them to complete their review
- Supervise bookkeeper

Reporting Committees

- Audit committee

SECRETARY

Responsibilities

- Maintain Dropbox and Google Drive, including Chapter historical records and operations documents.
 - Record, prepare, disseminate and maintain minutes at BOD Meetings, Board Retreats and Chapter Meetings.
 - Provide minutes for approval by meeting participants. Incorporate feedback prior to the next month's meeting so that they may be approved by the board.
 - Convert approved minutes into .pdf format and post to the NAPO-DC website in the Members-Only Section. Post approved minutes on Dropbox.
- Send NAPO-WDC monthly, BOD and BOD Retreat minutes to NAPO within thirty (30) days after the end of each of the first three fiscal quarters (quarters ending December 31, March 31 and June 30) and forty-five (45) days after the September 30 fiscal year end.
- Review and update Chapter Policies and Procedures Manual, changes to be voted on by the BOD at the end of the term
 - Maintain inventory of NAPO-WDC official supplies and materials
 - Order name badges, drop plates, and pins for board members and award winners, or supervise a volunteer who does it.
 - Recruit and supervise lending library volunteers.
 - Maintain history, ethics, and bylaws.

Reporting Committees, when active

- Bylaws
- Ethics
- Grievance Task Force
- History

GENERAL BOARD

DIRECTOR OF COMMUNICATIONS & TECHNOLOGY

Responsibilities

- Establish a plan of action, timeline, format, design, content and budget to operate the website and oversee the maintenance and updates of the site
- Supervise Blog Manager, Small Events Publisher, Recommended Business and Resources Manager, and other C&T volunteers
- Serve on Marketing Committee
- Keep content and links on website current and relevant
- Setup chapter meetings and major events online
- Maintain logins and secure passwords for all Board accounts
- Setup and moderate virtual meetings and provide how-to assistance for participants
- Support BOD and volunteers who maintain the website and member data
- Attend conference calls with other Directors of Communications and Technology
- Maintain the BOD chapter email group
- Update technical documentation and create new ones as need arises

Reporting Committees, when active

- Website Committee

DIRECTOR OF BUSINESS PARTNERS (BPs)

Responsibilities

- Develop and recruit prospects, leads and new BPs
- Develop relationships and manage benefits of current BPs
- Oversee the BP membership application and renewal process
- Serve as liaison between BPs and BOD
- Maintain and update BP member benefits to ensure an enticing, high-quality program
- Work with Director of Membership to align procedures and membership updates
- Work with Director of Communication & Technology to maintain/update BP pages on website
- Ensures that BPs take full advantage of their promotional benefits
- Coordinate BP portion of sign-in tables
- Coordinating introduction of BPs and premium BP spotlight at Chapter Meetings

Reporting Committees, when active

- BP Committee

DIRECTOR OF MARKETING

Responsibilities

- Seek out opportunities, including social media, to increase public awareness of NAPO WDC , members, and the organizing profession
- Seek out opportunities to market NAPO WDC activities and opportunities to members and potential members
- Maintain the Chapter's social media accounts (e.g., Twitter, Facebook, LinkedIn, Instagram) and ensure that the Social Media Guidelines are current and updated, and include the best practices of engaging with the public

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- Act as the liaison between media and NAPO-WDC membership connecting NAPO-WDC members with members of the media for the purposes of articles or TV spots
- Create, manage, and send the monthly chapter e-newsletter
- Creates and delivers the Monthly Meeting invitations and reminders
- Maintain email list for chapter communications
- Create, distribute and review annual survey of membership with the Membership Director
- Supervise the Social Media Publisher, Meeting Photographer, Meeting Videographer, GO Month volunteers and other volunteers

Reporting Committees, when active

- Community Service and Partnerships Committee
- Products Committee
- Marketing & Public Relations Committee

DIRECTOR OF MEMBERSHIP

Responsibilities

- Serve as the liaison to NAPO-WDC membership
- Oversee new member activities, including orientation and brunch
- Oversee registration table at NAPO-WDC Chapter Meetings
- Serve as the primary contact for prospective members
- Oversee the membership application & renewal process
- Oversee production and distribution of the New Member Packets
- Prepare member name badges
- Update online and membership application prior to annual renewals and as needed
- Update membership information on website to include information on Join Our Chapter page
- Process monthly add/drop lists received from NAPO and list of national members who are not chapter members, including adding them to the email distribution list(s)
- Oversee Buddy/Greeter Program
- Mark all guests as present on the website and send attendance to Secretary after each meeting
- Scan in guest sheets and attendance sheets after each meeting and store in Dropbox
- Take all handouts, attendance sheets and supplies to each meeting
- Maintain Master Document detailing all members, guests, joins, drops, BP's, etc.
- Prepare Membership Report every month and send to NAPO National
- Approve all pending paid applicants who are members of NAPO National
- Store Membership reports, copies of the Master File and other relevant documents in Dropbox
- Organize New Members Brunch annually
- Oversee Mentor program
- Promote chapter to local organizers
- Enhance member experience by reminding members to utilize any NAPO-WDC benefit
- Respond to Napo national's occasional questions about membership.
- Create, distribute and review annual survey of membership with the Marketing Director
- Respond to any membership-related questions from members and non members.
- Supervise Mentor Program Coordinator
- Process monthly report from National that includes all chapter members (make sure it matches our own data and if not, communicate with National)

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Reporting Committees, when active

- Membership Recruitment & Retention Committee
- Hospitality Committee

**DIRECTOR OF PROGRAMS & PROFESSIONAL DEVELOPMENT
Responsibilities**

- Responsible for programming and logistics for chapter meetings
- Logistics
- Find and reserve Chapter Meeting locations
- Arrange for the correct setup of meetings at location
- Programming
- Procure and communicate with speakers using learning objectives from Board members and speaker suggestions from the entire membership
- Schedule and facilitate program portion of Chapter Meetings
- Update chapter meeting details on website and post meeting handouts and resources
- Develop ongoing educational programs in addition to Chapter Meetings
- Recruit and supervise volunteers to help with logistics and programming, including speaker greeters, table setup, and refreshments. Possibly create a committee.
- Supervise BCPO Liaison
- Manage issuing CEU certificates

Reporting Committees, when active

- Education & Programming Committee
- Meeting Logistics Committee
- Special Events Committee

**IMMEDIATE PAST PRESIDENT/DIRECTOR AT LARGE
Responsibilities**

- Serves as Advisor to the President
- Chairs the Nominating Committee
- Distribute updated BOD rosters to NAPO National
- May serve as Parliamentarian for Board and Chapter Meetings
- Will fill in where needed, such as fill a vacant position or serve as “co-director”, but with the title such as Director at Large, Membership (title cannot be called co-director)

Reporting Committees, when active

- Nominating Committee

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VICE PRESIDENT

Responsibilities

- Act in place of the President when the President is absent or unable to act
- Attend Executive Board Meetings
- Maintain the chapter voice mailbox, email box, and Post Office Box
- Create PowerPoint slides for chapter meetings and set up equipment to run slides or supervise volunteers
- Oversee dinners at BOD meetings
- Coordinate (with the Secretary) the end-of-year awards or supervise a volunteer
- Oversee Small Networking Groups (book clubs, podcast club, neighborhood groups, Golden CircleC)
- Attend the quarterly VP calls

Reporting Board Members:

- Director of Business Partners
- Director of Marketing
- Director of Membership
- Director of Communications & Technology

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COMMITTEES

Committees are established to address an area of interest or need that requires ongoing attention from year to year. The BOD must approve the establishment and elimination of standing committees (permanent). Special task forces are created and disbanded at the discretion of the BOD. The role a committee member plays is an important one and the success of the committee depends on the contributions made by each of its members.

RESPONSIBILITIES AND GENERAL DUTIES

- Attend all committee meetings
- Professional conduct is expected at all times (in manner and appearance) when representing NAPO-WDC
- Submit a status report to the pertinent BOD Member prior to each BOD Meeting
- Submit a budget to the pertinent BOD Member as may be required
- Shall be subject to the provisions and limitations of all applicable laws, the Bylaws of NAPO, the Chapter Bylaws, the Chapter Affiliation Agreement, and the Chapter Operations Handbook.
- Shall perform duties as may be prescribed in the NAPO-WDC Policies and Procedures Manual
- Shall act in the best interest of the association only
- Shall not use the position to benefit themselves or their business
- Shall avoid self-dealing and conflict-of-interest situations
- Shall not have any power or authority to act on behalf of the Chapter unless specifically authorized and empowered by the BOD to so act

COMMITTEE COMPOSITION

Each NAPO-WDC committee is composed of a chairperson, BOD Member, and member volunteers. The number of members on the committee is at the discretion of the chairperson. Committees can be co-chaired.

MEETINGS

All committees shall meet as circumstances dictate. The committee chair is responsible for scheduling and running the meetings. The appointed BOD Member should attend the first committee meeting of the new membership year. Future BOD Member attendance is discretionary unless they serve as chair. A committee member should be designated to take minutes to include actions and votes. Complete respect will be given to each speaker at all times. Decisions will be based on the best interest of the group and not on individual preference.

REPORTS

The committee chair shall report to a BOD Member on the status of the committee prior to each BOD Meeting. Written reports are preferred but verbal reports are acceptable if there was little or no activity.

BUDGETS

Committee and activity budgets are set during the BOD annual Retreat. New activities must be presented through the appropriate BOD Member as an RFA with clear lines of funding. Committee chairs may submit requests for reimbursement to the Treasurer for telephone calls, copies, fax, and postage charges, and supplies as needed and provided for in the committee budget.

PROPERTY AND INVENTORY

All materials and files received in connection with the committee position are property of NAPO-WDC and must be returned to the BOD liaison, the President, or passed on to your immediate successor at the end of your term.

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STANDING/PERMANENT COMMITTEES

- Audit - Treasurer
- Business Partners – Director of BPs
- Community Service & Partnerships – Marketing
- Education & Programming - Programs & Professional Development
- Hospitality - Membership
- Marketing & Public Relations - Marketing
- Meeting Logistics -- Programs & Professional Development
- Membership Recruitment & Retention - Membership
- Nominating – Past-President/Director At Large
- Website - Communications & Technology

AS NEEDED COMMITTEES

- Bylaws - Secretary
- Ethics - Secretary
- Grievance Task Force
- History – Secretary
- Products -- Marketing
- Special Events -- Programs & Professional Development

STANDING/PERMANENT COMMITTEES

AUDIT COMMITTEE

Performs an unbiased audit of the NAPO-WDC financials.

- Report to the Treasurer

BUSINESS PARTNER COMMITTEE

Helps the Director of BP's communicate with the BP's and NAPO-WDC members.

- Report to the Director of BP's
- Communicate with prospective BP's
- Oversee the Partners and Promotion Table

COMMUNITY SERVICE & PARTNERSHIPS COMMITTEE

- Reports to Marketing Director
- Seeks out and coordinates opportunities for members to participate in organizing and productivity community service projects
- Seeks out and coordinates opportunities to partner with community and governmental groups with the goals of community service and expanding public awareness

EDUCATION & PROGRAMMING COMMITTEE

In consultation with the BOD at the annual Retreats, the committee's main objective is to plan the educational portion of the NAPO-WDC Chapter Meetings for the coming year.

- Report to Director of Programs & Professional Development

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- Find speakers and other program materials for Chapter Meetings
- Serve as primary contact for Chapter Meeting speakers
- Send a letter of confirmation and a follow-up thank you letter to all speakers
- Serve as site manager for Chapter Meetings, handle preparations needed for the speaker's presentation
- Contribute program information to the chapter website and assist speakers posting to the blog
- Contribute to creating the agenda for the Chapter Meetings with the President and BOD
- Survey the NAPO-WDC membership for their ideas and areas of interest in organizing to plan programs for the coming year
- Coordinate and execute the educational portion of the Chapter Meetings
- Prior to annual BOD Retreat, survey the NAPO-WDC membership for their ideas and areas of interest in organizing and, based on the results, plan a wide range of programs targeted to their responses
- Informs NAPO-WDC members about the CPO exam dates. Is available for questions about the certification process.
- Report to Director of Programs & Professional Development
- Research and announce CPO examination dates and locations
- Research and announce changes in qualification requirements

HOSPITALITY COMMITTEE

The Hospitality Committee serves as greeters and welcoming guests and new members at our monthly Chapter Meetings and other chapter events. Their goal is to create a warm and friendly environment.

- Report to Director of Membership
- Assist with printing badges for new members and setup of registration tables at Chapter Meetings
- Speak with new members and guests to see if they have questions about the chapter and its benefits.
- Refer members and guests to people at the meeting if applicable (For example a new member might want to speak with a Golden Circle Member, a guest interested in photo organizing might want to speak to another photo organizer).
- Stay at registration tables and help register members, BPs, and guests at Chapter Meetings
- Facilitate meetings

MARKETING & PUBLIC RELATIONS COMMITTEE

- Director of Marketing serves as Committee Chairperson
- Promote membership to potential members
- Promote chapter activities to members
- Seek out opportunities to increase public awareness of NAPO-WDC, chapter members, and the organizing profession
- Assist with marketing and PR for special events, including GO Month

MEETING LOGISTICS COMMITTEE

- Report to Director of Programs & Professional Development
- Plan and coordinate logistics for chapter meetings, including securing locations and room setup.
- Recruit and coordinate volunteers for logistics - refreshments, tablecloths and table setup, etc.

MEMBERSHIP RECRUITMENT & RETENTION

This Committee concentrates on retaining current members while reaching out to increase membership.

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- Report to Director of Membership
- Call new NAPO members or NAPO members that have acquired certifications (in the DMV area of course) to see if they are interested in joining the chapter
- Organize a phone and email campaign to increase guests for September Meeting (guests are free)
- Reach out to any new organizers who are not NAPO members to educate them on the association and our chapter.
- Speak to fellow chapter members to gauge satisfaction with the chapter.
- Convey feedback from members to the Board
- Help write and analyze annual membership survey

NOMINATING COMMITTEE

The Nominating Committee is responsible for procuring current NAPO-WDC members in good standing with NAPO National for positions on the BOD for the upcoming membership year. The Nominating Committee is made up of the Immediate Past President / Director At Large, or a current BOD Member who is not planning to run again for the BOD, and two regular members who are not currently on the BOD.

- Chaired by the Immediate Past President / Director At Large / or a current BOD Member who will not be running again
 - In the event that the Immediate Past President / Director At Large / or current BOD Member who is not running again is unable or unwilling to serve, the President shall appoint a chairperson
 - Seek qualified members for BOD positions
 - The nomination process should follow a specific schedule. A copy of the schedule from the previous year is uploaded to dropbox.
 - Submit first call for nominations in December/January and issue the last call for nominations in February and at the February NAPO-WDC Chapter Meeting
 - Provide each nominee with a job description and responsibilities. The nominee must demonstrate a full understanding of the job and responsibilities and a willingness to meet these requirements before being accepted as a candidate
 - Instruct the nominee to contact the current BOD Member for a first-hand description of the job
 - Optional "Get to Know the Board" Activity for January or February Board Meeting to create interest in becoming a member of the Board.
 - Announce the slate of nominees at the end of February
 - Spotlight the new slate of nominees at the March Chapter Meeting
 - An election must be held in March even if the entire slate of officers and directors is unopposed
 - If all are running unopposed, the Chairperson may call for a vote during the March meeting
 - Submit the new BOD list to National within one week of election - usually at the end of March or beginning of April
- It is preferred that NAPO-WDC use a specific submission format when contacting NAPO National - you can find the submissions template in NAPO POINT: Go into Past President Community, Click on "Library" tab, You will see a sample Excel Spreadsheet to download.
- Conduct exit interviews with all outgoing Board Members and present findings to the President
 - Conduct a swearing in ceremony for the new Board during the May Chapter Meeting. The swearing in language will be uploaded to Dropbox.
 - Upload this year's Nomination schedule to Dropbox for reference

WEBSITE COMMITTEE

The purpose of the NAPO-WDC website is to maintain and improve the NAPO-WDC website as a resource for members and the public.

- Director of Communications and Technology serves as Committee Chairperson
- Assist the Communications and Technology Director in maintaining the website

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- Establish a format and regular features
- Coordinate design changes with the BOD
- Edit the website for grammatical errors and/or outdated information
- Check the website for broken links or other technical errors
- Set and meet deadlines for website changes
- Recruit members for the website committee
- Secure and expand links
- Increase visibility and viewership of the website by word of mouth, social media and other means of marketing
- Make recommendations to the BOD on issues such as website format, regular features, and design and content change.

AS-NEEDED COMMITTEES

BYLAWS COMMITTEE

The Bylaws Committee ensures that the NAPO-WDC Bylaws and Chapter Policies and Procedures Manual remain current; they address the needs of NAPO-WDC and comply with the NAPO National Bylaws. The Chapter Policies and Procedures Manual is an established course of action intended to guide present and future chapter decisions and actions and to comply with NAPO national and the chapter Bylaws.

- Report to Secretary
- Review Chapter Bylaws a minimum of every two years. See Section IX of the Bylaws for the procedures for adopting, amending, and voting on Bylaws
- Develop a structure and format for NAPO-WDC policies and procedures documentation. See the NAPO national Policies and Procedures Manual as a guide

ETHICS COMMITTEE

The Ethics Committee ensures that NAPO-WDC members adhere to principles outlined in the NAPO Code of Ethics. The principles provide guidelines for our professional conduct with our clients, colleagues, and community in order to establish and maintain public confidence in the integrity of NAPO members. The Code aims to preserve and encourage fair and equitable practices among all who are engaged in the profession of organizing. The Ethics Committee is made up of one BOD Member, one former BOD Member, and one regular member who has been a NAPO-WDC member for at least one year. The Ethics Committee will notify, in writing, any member not exercising judgment, self-restraint, and conscience in his/her conduct. The member will meet with the Ethics Committee to discuss the issue. If the issue is not resolved, it will be forwarded to the Executive BOD for final action.

- Report to Secretary
- Have a clear understanding of the NAPO-WDC Chapter Policies and Procedures Manual and Bylaws
- Discuss the issue with the individual and NAPO-WDC President
- Present the issue to the Committee
- Ask the individual to meet with the Committee to clarify the issue, if necessary
- Direct the Committee toward a fair unbiased decision based on the facts and governing rules
- Document the decision; send a written report to the BOD President and the aggrieved

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GRIEVANCE TASK FORCE

If any person, NAPO member or otherwise, has a grievance about the NAPO-WDC Officers, Committee Chairs, or NAPO-WDC operations, a written complaint will be filed with the President. If the President cannot resolve the issue, he/she will take the issue to the Grievance Task Force. The Grievance Task Force is made up of one BOD Member, one Golden Circle member, and one regular member who has been a NAPO-WDC member for at least one year. The decision of the Grievance Task force will be final. All matters will be kept confidential.

- Report to Secretary
- Have a clear understanding of the NAPO-WDC Policies and Procedures Manual, Chapter Bylaws and Chapter Affiliation Agreement
- Discuss the issue with the aggrieved and the NAPO-WDC President
- Present the issue to the Task Force
- Ask the aggrieved to meet with the task force to clarify the issue, if necessary
- Direct the Task Force toward a fair unbiased decision based on the facts and governing rules
- Document the decision; send a written report to the President and the aggrieved

HISTORY COMMITTEE

The History Committee is responsible for collecting data and materials that reflect or document the progress and activities of NAPO-WDC and its members.

- Report to Secretary
- Gather and preserve interesting information and memorabilia about NAPO-WDC and its members from BOD Members, committee chairs, and the membership
- Take pictures at NAPO-WDC events and/or secure copies of pictures others have taken. Note the date, event, location and names of the people in the photographs

PRODUCTS COMMITTEE

- Reports to Director of Marketing
- Creates, markets, and sells chapter products.

SPECIAL EVENTS COMMITTEE

Special events committees form around specific chapter events that are added to the chapter schedule. Before adding a special event to the schedule, it is recommended that the board know who will serve on the event committee to carry out the event.

- Reports to Director of Programs & Professional Development
- Plans and coordinates programming, logistics, and marketing for special chapter events.

THESE POLICIES AND PROCEDURES ADOPTED IN MAY 2020.