



TIPS FOR TOP-TIER ASSOCIATIONS

Top-tier associations establish procedures in the following five areas in order to grow and stay healthy. How does *your* association measure up?

FINANCIAL

- Do different people maintain the financial records and sign the checks?
- Are basic financial reports presented and explained at each board meeting?
- Is an annual budget prepared, approved, and adhered to?
- Are bank statements balanced monthly?
- Are records of revenues/expenses kept in an organized, consistent fashion?
- Are dues and other receivables effectively billed and followed up on?

BOARD OF DIRECTORS

- Are bylaws reviewed regularly and updated if necessary?
- Do directors make a commitment to attend meetings?
- Are board meetings run effectively, with an agenda established and adhered to?
- Are minutes taken and filed appropriately?
- Do directors read reports and minutes prior to the meeting?
- Do all volunteer positions have job descriptions?
- Is there a planning meeting at least once a year?
- Is there a succession plan in place?

MEMBERSHIP

- Is the membership database accurately maintained and updated (including prospects)?
- Is there a defined value statement as to why prospects should join the association?
- Are there procedures for member recruitment and finding new prospects?
- Are there procedures for member retention?
- Is there follow up with prospects who attend meetings?

MEETINGS

- Are they held at a regular time and location?
- Is the agenda defined ahead of time and adhered to?
- Are nametags provided?
- Is there a clearly defined purpose for meeting (educational or networking)?
- Is there an effective and efficient RSVP and check-in process?

COMMUNICATIONS

- Do members receive regular and accurate information about association and its events?
- Is information sent to the appropriate audience (members/prospects/sponsors)?
- Is the website frequently updated and easy to navigate?
- Is event information sent to free publicity outlets?

For help in any of these areas, contact:

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