

# CFDD Area Director Guide & Calendar

## Area Director Guidelines:

1. Area Directors are expected to communicate with the Presidents of assigned Chapters each month. Phone conversations are most effective and should be made at least every other month. Email communication is also acceptable IF you are receiving responses and maintain a consistent line of communication. Jot down noteworthy information to have handy when reporting to the CFDD Board during conference call meetings.
2. Area Directors should plan to attend both in-person Board meetings (held at Credit Congress and in conjunction with the fall National CFDD conference) and to participate in Board meetings held by telephone conference call.
3. Area Directors should plan to write at least one article during their leadership term for the CFDD Newsletter published in January/February, March/April, May/June, July/August, September/October and November/December. The newsletter is distributed on the first business day of the issue month.
4. Area Directors serve in the critical role of being links to Chapter Presidents and Chapter Boards. Area Directors are expected to develop strong relationships with the Presidents of assigned Chapters. If communication with a Chapter President is challenging, please consult with members of the Executive Committee and reach out to other members of the local Chapter's Leadership Team.

## Access to Resources

When speaking with members of a Chapter's Board of Directors, it's helpful to understand who has access to the various resources available on the CFDD website. Access to some resources on the CFDD website is limited to certain members of a Chapter Board. This explains why it is so important for Chapters to submit a Leadership Report, or a roster of Board members that includes terms and positions to National. For example, all members of a Chapter Board have access to the CEU request form but only Chapter Presidents and Chapter Membership Chairs have access to membership reporting. Chapter Presidents and Chapter Membership Chairs also have access to their Chapter's entire membership roster online.

Resource	Who has access?
Members Only Page	All CFDD Members
Scholarship Applications	All CFDD Members
Award Nomination Forms	All CFDD Members
CEU Request Portal	All CFDD Chapter Board Members
Membership Reporting Portal	Chapter President & Chapter Membership Chair
Roster of Chapter Members	Chapter President & Chapter Membership Chair

## Chapter Reports

Chapters are asked to complete and submit reports that fall into three categories: membership, leadership and statistical.

### Membership Reporting

For National dues billing purposes, CFDD's membership year is based on calendar quarters. Therefore, Chapters are asked to submit membership reports four times annually. Memberships reports are due by the 10<sup>th</sup> of the month, following each calendar quarter, or on April 10<sup>th</sup>, July 10<sup>th</sup>, October 10<sup>th</sup> and January 10<sup>th</sup>. With the new membership reporting portal, CFDD Chapters may submit changes more frequently to keep pace with changes "real time."

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## Leadership Reports

A Chapter Leadership Report is a Chapter Board roster. To ensure that members of Chapter Boards are provided with proper access to resources, it's important that Board rosters include not only leadership positions but also leadership terms. Chapters are invited to use the Leadership Report template or may simply send a roster in Excel or Word format.

## Statistical Report

The information submitted on the Statistical Report helps build a profile about each Chapter. Information about the amount of Chapter annual dues, about the frequency of Chapter meetings, average meeting attendance contribute to each Chapter's profile. The information supplied about the number of scholarships a Chapter awards, and the dollar value of awards made, supports our calculation about the impact CFDD makes on its members through scholarship support.

## June

- Review the Leadership Guide and set goals for the year.
- Set up an email distribution list for each of your Chapters.
- Email a letter of introduction to the Presidents of your assigned Chapters and establish a line of communication. (A sample letter is posted to the Members Only Resources page, in the National Board Resources section.)
- Review the Annual Reports of your Chapters.
- Mark your calendar to ensure regular and timely contact with your Chapter Presidents.
- Add names of new National Chairman and other new Officers and Directors to your email distribution list.
- Remind Chapters: Chapter Quarterly Membership Reports for the calendar quarter ending on June 30<sup>th</sup> are due by July 10<sup>th</sup> and Summer Scholarship applications are due by July 15<sup>th</sup>.

## July

- Contact the Presidents of your assigned Chapters.
- Discuss and promote the Chapter Leadership Meeting scheduled in conjunction with the Fall Conference; our goal is to have representation at the meeting from each Chapter. Ask about Chapter News: photos of members are needed for the CFDD Newsletter.
- If possible, set dates with your Chapter Presidents to visit your Chapters and attend a Chapter event or meeting.

## August

- Contact the Presidents of your assigned Chapters. Topics of discussion with your Chapter Presidents include submitting a written report by August 31 to you to help you prepare for your Business Meeting presentation at the fall conference. Area Directors provide the membership a report on the Chapter activities (fundraising, educational content, chapter meeting attendance). Urge your Chapter Presidents to attend (or send a representative to) the annual CFDD Chapter Leadership meeting, held on the day prior to CFDD's fall National Conference. (Milestone membership anniversaries are recognized at each conference.) Ask whether your Chapters have planned to make a contribution to the CFDD National Scholarship Fund at the fall conference. Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.
- Finalize your plans to attend the fall Chapter Leadership & CFDD National Board Meeting at the Fall Conference. Dress attire for Board meeting as well as the conference is professional business casual.
- Make an effort to contact first-time National conference attendees from your assigned Chapters.

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- Ask your Chapters to consider making a contribution to the CFDD National Scholarship Fund prior to the CFDD National Conference; Chapters are asked to mail their donations to National prior to the conference. Chapters are recognized during the conference for their generous contributions and support.
- Remind Chapter Presidents to appoint a Nominating Committee if Officers are on a Calendar Year (Jan. to Dec.)

## September

- Attend the fall Chapter Leadership, National Board Meeting and National Conference. Dress attire for Board meeting and conference is professional business attire.
- Contact the Presidents of your assigned Chapters. Make plans to meet them at the Leadership meeting and to meet your Chapters' conference delegations. Thank the Chapter President if a Chapter donation was made to the CFDD National Scholarship Fund. Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.

Remind your Chapter Presidents that Chapter quarterly membership reports for the period ending September 30<sup>th</sup> are due by October 10<sup>th</sup>. Eligibility for scholarships is based on being a member for six months; a new member would need to join in September to become eligible for the March 15<sup>th</sup> awards.

## October

- Contact the Presidents of your assigned Chapters.
- Remind your Chapter Presidents that Quarterly membership reports for the period ending on September 30<sup>th</sup> are due by October 10<sup>th</sup>.
- Ask for feedback (comments or suggestions) regarding the National Conference so they may be shared with the Board.
- Discuss the upcoming year-end membership renewal invoices, which are usually mailed in October or November. Discuss membership engagement at the Chapter level and offer advice, if needed. Your advice could include calling members not seen at events or dropping a handwritten note into the mail to convey how much members are missed.

## November

- Contact the Presidents of your assigned Chapters.
- During the holidays, it's a great time to thank members for belonging and talk about the benefits of membership!
- If Chapters follow a calendar year, ask about Board elections; Officers and Directors should be elected by November 30<sup>th</sup> for Chapters following a calendar year.

## December

- Contact the Presidents of your assigned Chapters with holiday greetings!
- Remind Chapter Presidents that Quarterly membership reports for the period ending on December 31<sup>st</sup> are due January 10<sup>th</sup>. Each Chapter's annual dues are invoiced based on the December 31<sup>st</sup> membership report. National Membership Awards are measured based on the December 31<sup>st</sup> report. Scholarship applicants must also be a member for six months to meet the eligibility requirement.
- If your Chapters follow the May to April fiscal year, remind your Chapter Presidents to appoint a Nominating Committee in preparation for Board elections.
- Encourage your Chapters to promote Credit Congress attendance.
- Remind your Chapter Presidents that the best registration fee for Credit Congress ends on the first Friday of December.

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## January

- Contact the Presidents of your assigned Chapters with New Year greetings!
- Remind your Chapter Presidents that 4<sup>th</sup> quarter membership reports are due on January 10<sup>th</sup>. Eligibility for scholarships is based on being a member for six months; a new member would need to join in January to become eligible for the July 15<sup>th</sup> scholarship awards.
- Remind your Chapter Presidents of the **March 15<sup>th</sup>** deadlines for:
  - Spring Scholarship Applications
  - Awards in Recognition of *Chapter Excellence*
    - Outstanding Regular Program
    - Outstanding Seminar or Workshop
    - Outstanding Chapter Publicity Award
  - Awards in Recognition of *Member Excellence*
    - National Mentor Achievement
    - Distinguished Member Achievement (DMA)
    - The Spirit Award
- Remind Chapters that the CFDD Scholarship Fund contribution deadline is March 31<sup>st</sup> if a planned donation was not presented at the fall conference.
- Encourage Chapters to promote Credit Congress attendance.

## February

- Contact the Presidents of your assigned Chapters.
- Remind your Chapter Presidents that 4<sup>th</sup> quarter membership reports were due on January 10<sup>th</sup>. Check the Operations Report to see if your assigned Chapters reported; if not, ask about the report. Eligibility for scholarships is based on being a member as of January 1 and Annual Membership Awards are calculated based on December 31<sup>st</sup> totals.
- Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.
- Remind your Chapter Presidents of the **March 15<sup>th</sup>** deadlines for:
  - Spring Scholarship Applications
  - Awards in Recognition of *Chapter Excellence*
    - Outstanding Regular Program
    - Outstanding Seminar or Workshop
    - Outstanding Chapter Publicity Award
  - Awards in Recognition of *Member Excellence*
    - National Mentor Achievement
    - Distinguished Member Achievement (DMA)
    - The Spirit Award
- Remind Chapters that the CFDD Scholarship Fund contribution deadline is March 31<sup>st</sup> if a planned donation was not presented at the fall conference.
- Begin discussing whether any Chapter Leadership has an interest in advancing to the CFDD National Board. Area Director applications are due by April 1<sup>st</sup>.

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## March

- Contact the Presidents of your assigned Chapters.
- Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.
- Remind your Chapter Presidents of the **March 15<sup>th</sup>** deadlines for:
  - Spring Scholarship Applications
  - Awards in Recognition of *Chapter Excellence*
    - Outstanding Regular Program
    - Outstanding Seminar or Workshop
    - Outstanding Chapter Publicity Award
  - Awards in Recognition of *Member Excellence*
    - National Mentor Achievement
    - Distinguished Member Achievement (DMA)
    - The Spirit Award
- Remind Chapters that the CFDD Scholarship Fund contribution deadline is March 31<sup>st</sup> if a planned donation was not presented at the fall conference.
- Chapter Presidents should complete and submit the Chapter Annual Statistic Report by March 31<sup>st</sup>. This report details the total number of Chapter members, Chapter dues, fees for Chapter meetings, the number and dollar value of Chapter Scholarship awarded in the past year.
- If Chapters follow the May-April fiscal year, ask about Board elections; Officers and Directors should be elected by March 31<sup>st</sup>. Remind your Chapter President to send a list of new Board members and positions to NACM once the new Board is installed.
- Remind Chapters: Chapter Quarterly Membership Reports for the period ending on March 31<sup>st</sup> are due by April 10<sup>th</sup>.

## April

- Contact the Presidents of your assigned Chapters.
- Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.
- Finalize your plans to attend the NACM Credit Congress; ask about who is attending Credit Congress from your assigned Chapters and make plans to meet and greet them.
- Prepare your annual report for National Chairman; Area Director reports are due on April 15<sup>th</sup>. A report template is on the CFDD website, on the Members Only Resources page in the National Board section.

## May

- Contact the Presidents of your assigned Chapters.
- Ask about Chapter News: photos of activities are needed for the CFDD Newsletter.
- Attend CFDD Annual Board of Directors Meeting (on Sunday prior to the opening of the Credit Congress)
- Purchase your ticket to attend the CFDD Annual Business & Awards Luncheon. You will be seated at the head table at the CFDD Awards Luncheon. Attend the Wednesday Organizational Meeting for Board of Directors.