



CLCA Leadership Manual



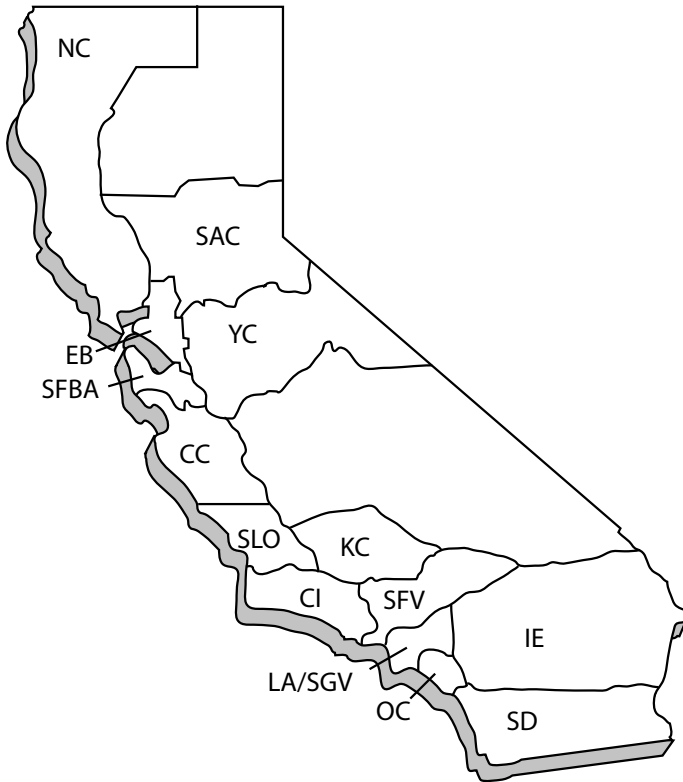
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This manual is also available online at clca.org/leadership ►



CLCA CHAPTERS

- CC** Central Coast
- CI** Channel Islands
- EB** East Bay
- IE** Inland Empire
- KC** Kern County
- LA/SGV** Los Angeles/San Gabriel Valley
- NC** North Coast
- OC** Orange County
- SAC** Sacramento Valley
- SD** San Diego
- SFV** San Fernando Valley
- SFBA** San Francisco Bay Area
- SLO** San Luis Obispo
- YC** Yosemite



CLCA Leadership Manual



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California Landscape Contractors Association
 1545 River Park Drive, Suite 525
 Sacramento, CA 95815
clca.org

Revised January 16, 2026

California Landscape Contractors Association



Setting the scene for a beautiful California

CLCA Mission

Serving the California Landscape Contracting Industry, we protect the member's interests, promote professionalism, and support their work to create beautiful, enduring landscapes that improve the quality of life in communities across the state.

CLCA Vision

The California Landscape Contractors Association members will be recognized by the public as the best qualified professionals of the landscape industry.

Membership Benefits

member.clca.org/member-benefits

CLCA Insurance Solutions

100% owned by CLCA, it's the only endorsed program that provides members competitive insurance placement while providing support beyond the quoting and binding experience.

License #OI72721

Why Choose CLCA Insurance Solutions?

- Great value in the ease of requesting information on your existing policy.
- Dedicated 24/7 service
- Customized coverage for CLCA members to help control your bottom-line insurance costs.

Expert Advice: HR Hotline

California's laws, rules and regulations about the employer/employee relationship are complex and confusing. We all have questions and CLCA's Human Resources Hotline helps with answers! No charge for initial consultation! clca.org/hr

Expert Advice: Legal Hotline

Need general legal advice or have questions about construction law? CLCA's Legal Hotline specializes in construction law, labor and employment law and business entities. Our legal partner provides consulting and litigation services in a variety of areas, including mechanics' liens, stop notices, bond claims, construction defects, contract claims, prevailing wages, bid protests and labor and employment matters. No charge for initial consultation! clca.org/attorney

NEW BENEFIT!

Expert Advice: Safety Hotline

Safety is more than OSHA compliance, so CLCA's new Safety Hotline goes beyond providing guidance and support for interactions with Cal/OSHA and other state and federal agencies. Through support and training, it can help you maximize profits by reducing the costs and risks associated with workplace injuries and illnesses. Safety training provides your organization a competitive edge! No charge for initial consultation! clca.org/safety

CLCA HR, Legal and Safety Hotlines brought to you by the generous support of CLCA Insurance Solutions.



Legal Contracts

CLCA offers 13 different landscape construction and maintenance contracts and legal forms. These easy-to-use fill-in-the-blanks PDFs were created by a construction law attorney and include terms and conditions specific to the landscape industry. Unlike many landscape forms available from national organizations, ours comply with California's unique laws. clca.org/contracts

Peer Consulting Program

The Peer Consulting program offers you an efficient, casual avenue to connect with experienced and insightful industry colleagues who have "been there, done that." CLCA's peer consultants can help you find solutions, explore new perspectives or weigh next steps. clca.org/peer

Find My Contractor Search

See clca.org/profile to set up your free listing in CLCA's Find My Contractor Search.

Credit Division — Business Concierge

Offering business management outsourcing, Credit Division's dedicated team can help your business maintain cash flow and prepare preliminary notices, lien paperwork and more while you focus on your client relationships. clca.org/business-concierge

Fuel Your Fleet with Flyers

CLCA has partnered with commercial fuel distributor Flyers Energy to offer you a full service, premier commercial fuel discount and security program. clca.org/flyers

Chapter Officer Position Descriptions

▼ Immediate Past President

Basic Role:

This is the “mentor” and “guidance counselor” position, which is designed to give significant support to the chapter president. As the past president, you’re there to help the president succeed in their position and to provide “templates” of how things are done, based on your experience, without interfering with the president’s style of leadership.

Specific Responsibilities:

- Attend your chapter board meetings as well as general membership meetings.
- Provide input to the chapter board based upon your experience as a chapter president.
- Assist in guiding and monitoring your chapter’s various committees.

- Assist in areas that need your expertise (i.e., community projects, seminars, social events).
- Help welcome your chapter’s new members.
- As part of your chapter’s member retention program, help with phone calls to your chapter’s existing members, asking them how things are going and offer to help them in some way or help make calls to members whose memberships are about to lapse or recently lapsed.

Depending on your chapter, past presidents are a great resource for chapter events, so ask for their help. They can offer help and insight based on their previous experience.

▼ President

Basic Role:

The chapter president is responsible for the overall administration of the chapter and is also the main contact and representative for the chapter.

Below are some of the duties of the president:

- Attend the CLCA Leadership Conference.
- Attend all Chapter Presidents Council meetings throughout the year and represent your chapter at these meetings.
- Oversee everyone on your board, making them accountable for reports and tasks.
- Preside at all meetings of the board. Email an agenda before each meeting. Request committee chairs submit status reports at each board meeting on the progress of their objectives for the year. Be sure that the secretary takes minutes, and that they send a copy of the minutes to each board member (especially to the newsletter editor if minutes are published in the chapter newsletters) and to CLCA headquarters.
- Guide and monitor chapter committees and their progress.
- Adhere to your chapter’s bylaws regarding all written contracts, check writing, chapter obligations, etc.
- Co-sign (with the treasurer) checks drawn on the chapter’s treasury, as per your chapter policy.

- Represent the chapter at all CLCA state functions (leadership conference, annual convention).
- If a CLCA state official visits your chapter, you are responsible for making all arrangements for the day’s activities.
- Be responsible for updating your chapter about state events, programs, etc. As the liaison between the state and your chapter, keep communication flowing to ensure your members are informed.
- Write and submit your *President’s Message* for chapter newsletters.
- Represent your chapter at civic and community affairs within the chapter area, and frequently speak on behalf of your chapter when authorized or requested by your board.
- Encourage new members to participate by welcoming them to your chapter. Call them up, invite them to a dinner meeting, recognize them at dinner meetings and assign other board members to “buddy up” with them. Your welcome will make a difference in their ongoing chapter involvement.
- Be responsible for adhering to the Chapter Affiliation agreement with CLCA, making sure your chapter is compliant.
- Remember to have fun and enjoy your year as president. It will go by too fast!

Chapter Officer Position Descriptions

President — *continued*

Planning Session:

As the chapter president, you're responsible for coordinating your chapter's annual planning session, during which the outgoing and incoming board members discuss the chapter's upcoming year's goals, how to achieve them and what to include in your calendar of events. Planning sessions also provide a structure, which facilitates the transition between boards.

You can consider asking a state board member or other chapter leaders to facilitate your planning session.

Timeline

Ideally, planning sessions should happen in August or September.

Participation

Outgoing and incoming board members should attend. This meeting can also be open to the membership at large. Inviting participation from your membership will help ensure that the year's events will meet their needs and be well attended. Allow ample time for announcement and follow-up.

Venue and Format

- Select a conveniently located venue that will accommodate your group.
- Prepare an agenda.
- Convert your mission statement into specific goals.
- Set timelines for your goals.
- Assign board members to do tasks.
- Distribute copies of your planning session document to board members and anyone assigned to a committee.
- Monitor progress and make members accountable.

Chapter Meetings Protocol:

1. The President is responsible for inviting the CLCA state president, state board members, and/or staff members to chapter meetings as needed. Sample events include:
 - Chapter officers' installation
 - Any board meeting
 - Any chapter meeting (general membership)
 - Special events such as holiday parties
 - Presentation of life member plaques
 - Beautification awards
2. When a chapter invites the state president, other board members, or staff to attend a meeting, their travel expenses are budgeted at state level. However, it is the chapter's responsibility to take care of their dinner or lunch expenses.
3. Alcohol is not encouraged at any chapter board meetings because of liability issues.

Chapter Officer Position Descriptions

▼ Education

Basic Role:

You are responsible for planning and coordinating the chapter education programs. These are the formal seminars that focus on specific topics. Scope of duties may also include some responsibility for educational seminars sponsored by the state's Education Committee unless a separate person has been named. Build a strong committee by finding volunteers who have the passion and expertise in this area.

Specific Responsibilities:

- In conjunction with your board, determine the number and types of educational programs that will be conducted. The schedule should reflect a balance of offerings based on both educational content and geographic location.
- Closely work with your chapter's Events person (if that's not you) in selecting meeting space, details of the meeting, including meals, AV, rooms, etc.
- If there are any materials to be distributed, obtain them

from the speaker and provide for duplication and distribution.

- As needed, coordinate seminars with staff at state headquarters.
- In your chapter newsletter, be sure to have an announcement prior to the program date and a summary after the presentation to share its success with the members. PROMOTE. PROMOTE. PROMOTE!
- Add educational events to your chapter's online calendar so that they can be promoted in the monthly *CLCA Events Alert* eblast and in CLCA social media channels.
- Conduct an evaluation of the program at the end of the meeting to determine its success and provide input for future planning.
- As needed, attend and report to the chapter board on the success of your programs.

▼ Membership

Basic Role:

Membership is one of the most important positions on the board. Your responsibility is to manage the chapter's recruitment and retention efforts, incorporating the state committee's ongoing membership campaign and marketing efforts.

Specific Responsibilities:

- Set a membership goal for your chapter (both recruitment and retention) for the year.
- Develop and implement a member recruitment and retention campaign for your chapter.
- Keep track of your chapter's membership status by reviewing the monthly membership reports sent by staff at state headquarters.
- Attend state membership committee meetings and/or conference calls.
- Always have updated membership applications and brochures available at chapter functions.
- Consider having a membership night — invite one or two individuals from each company you know in your area to attend a general membership meeting at no cost.

Other Responsibilities:

- Review the attendance lists for your programs and identify less active members who may need personal encouragement to get involved.
- Welcome your new members and keep them engaged right away. Bring them to your chapter events.
- At dues renewal time, assist state headquarters staff by calling those who did not renew their dues.
- Use the C-27 lists from headquarters for your recruitment efforts. Have other board members to help you with phone calls.
- Work closely with your chapter's Events person to ensure good attendance at chapter meetings.
- Work closely with your chapter Editor to make sure that new members are recognized in your chapter newsletters. Write articles in the newsletter to keep reminding members about the benefits of CLCA membership or use promotional materials provided by state.

Selecting A Membership Committee

Your chapter should have a membership committee consisting of at least three people so you can divide up the tasks of recruitment and retention.

Membership — *continued*

Recruit

Taking the lead for your chapter's recruitment efforts, you should engage the entire board by asking each person to actively reach out to non-members. Membership recruitment is everyone's responsibility.

- Divide the C-27 list from CLCA headquarters so each board member can contact prospective members.
- Invite prospective members to chapter events and introduce them to everyone.
- Welcome prospective members at the beginning of chapter events. Assign board members to buddy with them so they don't feel left out.

Retain

Member retention is much easier and less expensive than new member recruitment. All it takes is nurturing.

- Use your member lists and ask existing members to help with small tasks. The number one reason why members don't participate is because board members/chapter leaders don't ask.
- Figure out what makes members passionate about CLCA and expand on that enthusiasm.
- Like friendships and relationships, retaining members takes time. So take the time to get to know your members and establish a strong foundation, and you'll have new relationships to build on and grow with CLCA.

Tools You Can Use

CLCA headquarters has the following membership tools that can help you with your recruitment efforts:

- Membership applications
- Brochures that highlight CLCA member benefits
- CLCA decals
- Give-aways for trade shows
- Member benefit promo materials

Note: To request your supply, call headquarters at (916) 830-2780 or email info@clca.org.

Membership Recruitment Tips & Techniques for All Chapter Leaders

1. Invite a non-member to one or two meetings during the year.
2. Invite a number of non-members to a breakfast or luncheon meeting to learn about CLCA.
3. Send/email non-members your chapter newsletter and event info.
4. Send non-members an annual survey of membership needs.
5. Set up membership committee to handle both recruitment and retention.
6. Stay on top of trends — declines, increases — in membership numbers of your chapter.
7. Give members the educational programs they want and need.
8. Vary types of programs, times, locations to meet needs of various members.
9. Try new creative programs that may interest non-members.
10. Make sure your membership committee is well versed in CLCA benefits and services at both state and chapter levels.
11. Recognize those individuals who bring in new members!
12. Have a monthly membership committee progress report at board meetings. Involve all chapter board members in the recruitment and retention process.
13. Create roundtable forums for members. Share the feedback from forum attendees with prospective members or have roundtable participants speak with prospects directly.

Chapter Officer Position Descriptions

▼ Events

Basic Role:

You are responsible for planning and coordinating a series of high-quality meetings and events for the chapter.

Specific Responsibilities:

- Determine, with your board, the number of events to be held during the year.
- Determine which meetings are to include a meal (breakfast, lunch, dinner) and/or a reception.
- Decide which meetings will have a special focus such as Membership Night, golf tournaments, etc.
- Based on any membership surveys that you may have conducted and other input, select the topics that will be presented at each meeting.
- Secure speakers for each meeting and keep them informed about the audience they will be addressing.
- If there are any materials to be distributed, obtain them from the speaker and provide for duplication and distribution.
- Work closely with your treasurer to develop a budget for the membership meetings and monitor the related expenses.
- Select meeting space and work with the facility on the details of the meeting, including meals, AV, setup, etc.
- Provide the person who will be coordinating the program with all the appropriate marketing information about the program — ideally, six to eight weeks before the date of the presentation. Be sure to promote the program to potential attendees and chapter members covering the important questions of Who? What? Where, When? Why attend? Cost to attend?
- In your chapter newsletter, be sure to plan an announcement prior to the program and a summary after the presentation to share its success with the members. Be sure to add the event to your chapter's online calendar.
- As needed, attend and report to your chapter board the status/success of your programs.

Membership Meetings

Chapter events and meetings are the most popular format used by the chapters of CLCA. They combine a technical or informational presentation of less than an hour with the opportunity to network with others. The Events Committee usually coordinates these meetings.

These programs are designed for all experience and functional levels of membership. The topic can certainly be focused on a single area of landscaping but generally will appeal to a majority of members. New regulations, hot topics in the profession, and important local issues are popular.

- Speakers should be knowledgeable about the subject matter and have excellent presentation skills with a large audience. An individual or a panel of presenters could present the topic. Q & A periods are useful at the end of the meeting to summarize the information.
- Handouts are preferable but they can be in outline format and be supplemented with relevant articles.
- Networking can take place before the meeting at a reception or during the meal.

Experiment with having breakfast, lunch, and dinner meetings to determine what is best for your chapter. Some chapters have also been successful having the technical program first followed by a reception and hors d'oeuvres instead of a full meal. This keeps the per person cost down and reduces the time commitment.

Another alternative is to set the registration fee to allow the individual to choose the combination that is best for them — (i.e., technical program only at \$25, or program and dinner at \$50).

- Special Nights can be combined in the meeting format such as Past Presidents' Night, Membership Night, etc.
- The chapter's annual membership meeting should be your most highly attended event. Meeting notices should be sent to all members well in advance of the meeting (at least four to six weeks).
- A non-member mailing list should be maintained that includes prospects.
- Attendance at relevant programs is the best way to interest non-members in CLCA membership. Giving members a discounted registration helps encourage membership and reminds members of the value included in their membership.

Chapter Officer Position Descriptions

Events — *continued*

Kickoff Meeting (1st Meeting of the Year)

The Kickoff Meeting is a social event intended to ‘kick off’ the new year for the Chapter. Keep this meeting fun and light.

Timeline

Item	When/Weeks-Months Before Event
1. Budget Approval	Before January 1
2. Date Selection/PR	3 months
3. Venue Selection	3 months
4. Recruit Sponsors	3 months
5. Design/Approve Invitations/PR	2 months
6. Invitations Mailed/emailed	4 weeks
7. Review RSVPs	2 weeks
8. THE EVENT	

1. Budget Approval.....Before January 1

The budget for this event should be reviewed and tentatively approved by the outgoing board’s last monthly meeting. At that time the board will:

- Decide if event is to make money or break even.
- Review sponsorship opportunities (please see Sponsorship section).
- Review budget for previous year’s holiday party, if available.
- Establish an estimated expenses for current year’s event.
- Establish projected revenues for current year’s event and sponsorships.
- Determine pricing for tickets.
- Determine who will get comp tickets (i.e., CLCA state board members, chapter president, etc.).

Note: If you have a sponsorship program (please see sponsorship section) you may have money available to underwrite a portion of your costs.

2. Date Selection/PR..... 3 months

The Kickoff Meeting is usually scheduled for early in the calendar year: mid to late January or February.

3. Venue Selection 3 months

Selecting the right venue can make the difference between having a successful event or not. Remember, this is meant to be a light, fun meeting. Things to think about are:

- What do your members like to do? Can you include an activity in the event, i.e.: a sport, play, a comedy act?
- What meal will you be serving? Lunch, dinner, appetizers? Will it be a sit down meal, buffet or will you have a happy hour?
- Will there be opportunity and room for members to network? If you’re having a sit down dinner, consider having a no-host bar for at least an hour prior to beginning your event.
- Buffets provide ample opportunities for networking. An evening of appetizers and drinks also works well.
- Will you have music? Dancing? Can your venue accommodate the entertainment?
- Is there ample parking? Do you need valet parking?

IDEA: If you have a small chapter, consider joining efforts with an adjacent chapter to create a larger group.

4. Recruit Sponsors 3 months

The committee member in charge of sponsorships can contact potential sponsors. Correspondence should clearly state sponsorship levels and what they include. (See Sponsorship section for more information.)

5. Design/Approve Invitations/PR 3 months

- Consider using a template for your invitations that can be reused every year.
- Consider giving discounts to early bird RSVPs.
- State clearly on the invitation your policy for late RSVPs, drop-ins and cancellations.
- Have an article announcing the event in your chapter newsletter including date, time and venue.

6. Invitations Sent/Emailed..... 4 weeks

IDEA: Given enough notice, many State board members or other chapter board members will attend other chapter events and lend support. Invite them early (and comp them, of course!). Board members: At the event, introduce state representatives to local members.

Chapter Officer Position Descriptions

Events — *continued*

7. Review RSVPs.....3 weeks

The committee member receiving RSVPs creates a form to be used at the event to check people in. It should include: name, company, how much is owed or has been paid. This form and the checks can then be turned over to the Treasurer.

IDEA: If you haven't received an adequate number of responses, send an email to the membership reminding them to respond or ask board members to call members who have not responded.

8. THE EVENT

Registration:

The registration table has at least two people to check guests in and collect any money due.

IDEA: Ask board members to help at the registration desk and bar. Pay special attention to new members, potential members and sponsors.

Program:

The evening begins with at least one hour of drinks and networking. When the meal is served (or if a

buffet, when everyone is seated), the Chapter President welcomes guests, acknowledges sponsors and special guests. This is a good time to acknowledge any past Presidents in attendance. It's also a great venue to acknowledge newly certified CLCA Water Managers. The Chapter President then gives a preview of what's to come during the year.

Debriefing:

Committee members should hold a debriefing meeting no later than two weeks after the event to evaluate the success of the program and to discuss areas needing improvement.

At Every Event

- Have name badges (pre-printed if possible).
- Hang your sponsorship banner and/or acknowledge them in your printed material and at the event (see Sponsorship section for more details).
- Acknowledge state representatives, new members, potential members and other special guests.

▼ Secretary

Basic Role:

You are responsible for maintaining an accurate listing of the chapter's official records: chapter bylaws, minutes, copies of monthly newsletter, chapter's correspondence, approved financial records, etc.

You're also responsible for maintaining effective communication between your chapter and its membership and between your chapter and state.

Specific Responsibilities:

- Take minutes of all chapter board meetings and distribute them to board members, CLCA headquarters and other chapter editors.
- Prepare and distribute to chapter board and state a roster of officers and board members with their addresses, phone and e-mail addresses as well as update the list as needed.

- Become familiar with state and your chapter's bylaws as well as membership policies at both the state and chapter levels.
- Work closely with your chapter's membership person in keeping your chapter's membership list accurate. On a monthly basis, headquarters sends your chapter membership person a current list of your members; you should make sure that you have the same information at all times.
- Handle all chapter mailings/emails if they're not handled by editor or someone else.
- Support and monitor those committees assigned to you.
- Unless someone else in your chapter is responsible for it, you're the person to maintain the chapter roster with address changes, phone numbers, etc. CLCA Headquarters also sends chapters a revised chapter membership list at the beginning of each month.
- Maintain and keep approved chapter bylaws.

Chapter Officer Position Descriptions

▼ Treasurer

Basic Role:

You are responsible for keeping financial records in good order and meeting any regulatory requirements of the chapter.

Specific Responsibilities:

- Obtain checking and savings account records, files and legal documents from your predecessor.
- See that bank signature cards are filed promptly to avoid any delay in bank processes.
- Note CLCA's tax exempt EIN number: 94-1295004.
- You and your chapter board should prepare and approve the chapter's annual budget prior to January 1. Funds for expenses should be allocated in accordance with the chapter's yearly plan.
- Recommend a two-signature policy for financial transactions. **Online transfers should be avoided at all times. Chapters should never have debit or credit cards.**
- The treasurer and chapter board of directors are liable for all chapter funds. Insist on maintaining an accurate record of chapter assets at all times.
- Prepare monthly financial statements and provide reports to your chapter board at every board meeting, or as needed.
- Collect revenues from all chapter activities, make related disbursements, and make your chapter board members aware of any concerns.

Monthly Responsibilities:

Include the following in a report to your chapter board and state headquarters:

- The chapter's monthly financial statement (bank reconciliation, P&L, balance sheet)
- Bank statements
- Canceled checks
- Copies of invoices
- Deposits
- CD statements, if any

Legal Liability:

The treasurer and chapter board of directors are liable for all chapter funds. Insist on maintaining an accurate record of chapter assets at all times. All chapter board members share in this responsibility by ensuring the treasurer's reports are reviewed and approved at the chapter monthly board of

directors' meeting. The chapter president should appoint someone to conduct a complete audit of chapter financial records prior to the beginning of a new year and to help train the new treasurer. All financial records are required to be kept on file for a period of seven years. Chapter treasurers should keep a copy of the prior and current year records on hand and forward all original financial records to CLCA headquarters for storage. Beware of online scams asking for funds transfer. Remember, individual board members cannot authorize expenditures of chapter funds – only approved written board minutes can do that!

Recordkeeping Guidelines/Definitions:

- **Treasurer's Report** — consists of chapter monthly financial statement, copies of bank statements, receipts and vouchers, board minutes (when pertaining to chapter funds and board approval of treasurer's report and budget overrides) and budget reconciliation. The treasurer's report must be approved at monthly board meetings by the board and approval recorded by chapter secretary in the written minutes of the board meeting. A copy of this report is to be filed with state headquarters monthly by the 15th of the following month.
- **Chapter Monthly Financial Statement** — a list of all financial accounts pertaining to chapter funds. Refer to Chapter Monthly Financial Statement Template supplied by CLCA headquarters.
- **Annual Budget** — Chapter boards plan monthly income and expenses for anticipated chapter events up to a year in advance. The Chapter Monthly Financial Statement typically contains columns/cells for listing these entries. The budget is reconciled and additions or changes recorded monthly in the minutes of the board's meetings. Budget overages must be approved by the chapter board.
- **Board Minutes** — A written record of monthly board actions, motions, votes and members' (including treasurer's) reports.
- **Bank Statements** — A printed statement supplied by the institution in which the chapters funds are kept, including checking, savings and CDs. Each statement is to be reconciled monthly with the chapter checkbook ledger.

Treasurer's Report Compilation:

- Build or download the Chapter Monthly Financial Statement Template, including formulas, onto a digital spreadsheet workbook. Set a separate sheet within the workbook for each month of the year. (hint: easiest to copy and paste entire sheet from previous month to new month, then enter the applicable data for the current month.) The state-

Chapter Officer Position Descriptions

Treasurer — *continued*

ment can be customized for chapters by adding or deleting line item rows. Make sure there are corresponding income and expenditure line item rows.

- Record financial data at least monthly on the Chapter Monthly Financial Statement spreadsheet. Enter any income received by the chapter in the current month. Enter any expense paid by the chapter in the current month. Year-to-date income and expense data can be updated automatically utilizing the correct cell formulas within the year to date columns on the spreadsheet.
- Budget reconciliation can be reported within the chapter monthly financial statement spreadsheet. Yearly budget data can be updated automatically utilizing the correct cell formulas within the year-to-date budget columns on the spreadsheet.

- Receipts for every chapter income or expense (including cash income or expense transactions) must be obtained and kept by the treasurer for at least seven years. Copies of these receipts are required to be filed with CLCA Headquarters by the 15th of the following month as part of the treasurer's report to CLCA headquarters. Receipts for cash transactions should be noted as such, along with a log of what the receipt is for and to whom it was paid or received.
- All receipts may be scanned, kept digitally and sent electronically to CLCA state headquarters.
- All reports are due to CLCA Headquarters by February 15th the following year. December year-end reports should include the following year's approved budget.
- By January 15th, you must turn in a list of vendors that require 1099s to CLCA Headquarters.

▼ Associate Member Representative

Basic Role:

You support and promote the interests of the Associate Members.

Specific Responsibilities:

- Promote CLCA on a statewide basis: assist CLCA on a local and state basis.
- Promote membership programs and increase Associate Member and contractor member participation in CLCA.
- Communicate to all Associate Members.
- Improve and generate education and information about CLCA for all Associate Members.
- Participate on state committees.
- Promote CLCA activities at both on state and local levels.
- Associate Members may be elected onto the Board of Directors as well as chapter leadership.

AM Functions (State Level):

- Annual Convention: Golf tournament — proceeds go to a named AM Scholarship Fund for LEAF (Landscape Educational Advancement Foundation); hospitality events
- Annual Convention: Trophy Awards sponsorships, hospitality events
- Encourage and support the Partners for Success Program

AM Functions (Chapter Level):

- Participate in Suppliers' Nights: Mini Trade Show
- Attend and assist in Beautification Awards.
- Participate in chapter projects and Supplier of the Month (dinner meetings).
- Develop a Partners for Success program for your chapter (see following pages).
- Assist the chapter as needed.
- Help develop chapter dinner meeting topics.
- Write a monthly column in the local chapter newsletter introducing members to Associate Members and their products and services.
- Be a resource for chapter's various speakers on new and existing products, as well as technology in the industry.

▼ Legislative

Basic Role:

The Chapter Legislative Chair plays an important part in the legislative process and dissemination of material for the general membership. During the regular meetings with our lobbyist, bills are discussed which may affect your professional licensure and businesses. The Committee is educated on the State Capitol representatives who are authoring bills and in charge of committees that can determine a bill's survival. During the meetings, which tend to last about an hour, each bill is discussed with attendees and all views are heard prior to adopting a support or oppose position. It is important for the Legislative Chair to report at the chapter board meetings and at chapter general meetings.

Chapter Legislative Chairs who regularly attend CLCA's legislative meetings are invited to take part in the Legislative Action Conference. The Legislative Action Conference is held every other year in Sacramento. Legislative Committee members, CLCA leaders and our Executive Director meet with legislators and their staff as we educate them about CLCA, the industry and positions of concern on the legislative bills we are tracking.

Every Chapter Legislative Chair is encouraged to invite your local representatives to attend a local meeting. This allows your representative to get to know your chapter. It is very powerful to know your legislator, look them in the eye and shake their hands.

Lastly, we look to help CLCA's LandPAC to generate funds for candidates with whom we can begin important relationships — State Legislators who are on committees who may hear bills that affect CLCA.

Specific Responsibilities:

1. Attend monthly CLCA Legislative Committee meetings. Expect at least 1 to 1 ½ hours per meeting. Keep CLCA staff updated on contact information like phone and email.
2. Participate in committee discussions regarding bills with the lobbyist to assist him in how we want to proceed.
 - a. Oppose 1 = Lobbyist will connect with the bill's author and get better understanding of the bill's stance and depicting our objections.
 - b. Oppose 2 = Lobbyist will connect with other affiliate organizations that share our view.

- c. Oppose 3 = Lobbyist will write a letter in our objection to the bill and why.
 - d. Watch = Committee will continue to monitor the bill to see if any changes may be made to make the bill less or more objectionable. No action taken.
 - e. Support 1 = Lobbyist will connect with the bill's author and let them know of our support.
 - f. Support 2 = Lobbyist will connect with supporting affiliate organizations in support of the bill.
 - g. Support 3 = Lobbyist will write a letter in our support of a bill to its author.
3. Share the CLCA Legislative Committee information at chapter general/board meetings and in newsletter of at least three top bills of concern.
4. Coordinate with your board and programs director to have at least one meeting per year where a state or local political representative attends and/or speaks. Remember to take pictures for chapter website, chapter newsletter and social media.
5. Seek out board members and general members that show interest in legislation for active phone/email tree for communication of bills.
6. When needed, contact representatives locally with interested members on a specific bill.
7. If invited, attend the Legislative Action Conference in Sacramento.
8. Be active in helping raise funds for LandPAC.

Partners for Success

Sponsorship Program/Calendar Sponsors

Throughout this manual you will see references to contacting sponsors to help underwrite an event. As your chapter and your calendar of events grows, this can prove to be an exhausting process. One way to focus your energy and collect most of your underwriting dollars in one short block of time is to have a sponsorship program.

Note: Sponsors create attendance. A sponsor will attend every event they sponsor and, in most cases, bring a guest or guests.

A Sponsorship Program:

- Creates close, long term relationships between sponsors and CLCA members (sponsor's best potential customers!)
- Is a great way to pre-plan your revenues from sponsors
- Is a great way for your sponsors to pre-plan their investment in CLCA for the year
- Facilitates advanced planning of your annual calendar of events and determining how you will cover expenses

Timing and Method

The best time to solicit annual or calendar sponsors is late summer. Ideally, you will have commitments by January and can start planning your events with sponsorship money in the budget.

The Treasurer and the Sponsorship Committee should establish a goal amount to be collected. If this is your first year, look at your calendar of events and determine how much you can realistically expect your sponsors to underwrite. In subsequent years your sponsorship program will gain momentum since your sponsors will have a track record to look at and evaluate the exposure they received.

Note: You will still recruit more sponsors throughout the year and some calendar sponsors may also donate door prizes and other products throughout the year. See information about individual events for more information.

New Sponsors

The Chapter President should personally contact (no form letters) potential sponsors and include:

- A preview of the upcoming calendar of events
- Benefits of sponsorship - ability to pre-plan sponsorship dollars and exposure, consistent exposure throughout the year, complimentary tickets, advertising in your local newsletter, etc.
- Levels of sponsorship available - what each level is called, the cost and what benefits come with it.

Renewing Sponsors

The Chapter President should personally contact (no form letters) past sponsors who may renew. This letter should:

- Thank them for their support in the past.
- Remind them how their funds were used during the past year.
- Encourage them to renew their support and nurture their relationship with CLCA.
- Include a preview of the upcoming calendar of events and clearly state the benefits and levels of sponsorship available.
- Highlight any new benefits with which this sponsor is unfamiliar.

Sponsorship Levels and Benefits

Once you've determined your goal, identify what sponsorship levels you'll be offering and what benefits the sponsor receives. One popular way to identify sponsorship levels is to give them gem names or metals, (i.e., Emerald, Diamond, Ruby or Platinum, Gold, Silver, etc.). Each level contributes a different amount and receives a different level of exposure.

For example: *"Platinum Sponsor contributes \$1,000 and receives recognition at and one complimentary admittance to: Kickoff Dinner, Golf Tournament, Beautification Awards, Holiday Dinner."*

The budget with this sponsorship level in mind could be:

Event	Amount Allocated	Expenses
Kickoff Dinner	\$100.00	\$50.00 (Comp)
Golf Tournament	\$200.00	\$75.00 (Comp)
Awards	\$400.00	\$60.00 (Comp)
Holiday Dinner	\$100.00	\$60.00 (Comp)
Administrative Costs	\$50.00	\$50.00
Education/Scholarships	\$50.00	\$50.00
PR	\$50.00	\$50.00
Totals	\$1,000.00	\$415.00

In the above example you've allocated the full amount of sponsorship dollars and your estimated expenses. Here, you'll actually 'net' \$585.00. It's okay to make a profit; just don't be excessive about it. In a sponsorship program your maximum goal should be to break even — this is not a profit-making venture.

Note: It has been the experience of the chapters who utilize this system that sponsors happily renew their commitment year after year because they can easily project their annual expenses and sponsorship benefit.

Partners for Success — *continued*

Recognition and Support of Your Sponsors

- Print a banner listing all of your sponsors and display it at every event. (If you’ve started your sponsorship drive in the fall, you can have a banner printed by the Kickoff Meeting in February. If you continue to collect sponsorships you can reprint your banner once more mid-year.)

- Give your sponsors verbal acknowledgment at every event.
- Have a ‘Thank You Sponsors’ listing in your Chapter newsletter.
- Recommend your sponsors to your members and encourage them to use their products and services.

Beautification Awards

The Beautification Awards is one of the most important events of the year for recognizing and honoring individual member’s creativity and quality workmanship. It is a lively, fun event which promotes camaraderie, membership retention and attracts sponsors.

Timeline

Item	When/Weeks-Months Before Event
1. Budget Approval	Before January 1
2. Date Selection/PR	6 months
<i>Check clca.org/calendar for date conflicts with other chapters or events. Post your event to the calendar once your date is set!</i>	
3. Committee Selection	6 months
4. Venue Selection	4 months
5. Master of Ceremonies Selection	4 months
6. Plaque Selection	4 months
7. Solicit Entries	3.5 months
8. Recruit Sponsors	3 months
9. Site Arrangements	3 months
10. Recruit Judges	3 months
11. Entries Deadline	2 months
12. Design/Approve Invitations/PR	2 months
13. Judging Begins	6 weeks
14. Invitations Sent	4 weeks
15. Review RSVPs	3 weeks
16. Complete Plaques	3 weeks
17. Encourage Attendance	2 weeks
18. The Event	

1. Budget Approval Before January 1

The budget for this event should be reviewed and tentatively approved by the incoming board’s first monthly meeting. At that time the board will:

- Decide if event is to make money or break even.
- Review sponsorship opportunities (please see sponsorship section).
- Review budget for previous year’s awards event, if available (include invitations, venue fee, food and entertainment, plaques, photos, judges’ expenses, MC, parking, planning lunch and/or meetings).
- Establish an estimated expenses for current year’s event.
- Establish projected revenues for current year’s event and sponsorships.
- Determine pricing for entries and tickets.
- Determine who will get comp tickets (i.e., Judges, Chapter President, etc.).

Note: If you have a sponsorship program (please see sponsorship section) you may have money available to underwrite a portion of your costs.

2. Date Selection/PR 6 months

Consider sending a ‘Save the Date’ postcard or email to the membership as soon as a date of your event is determined. Subsequent notice can be sent closer to the date of the event. Your calendar of events in your chapter newsletter should reference this event as soon as possible.

Note: When selecting the date of the event, check clca.org/calendar so as to avoid date conflicts with other nearby chapter events and allow ample time for your members to prepare their projects for photography, judging and entry submissions.

Beautification Awards — *continued*

3. Committee Selection 6 months

The following tasks/elements need to be assigned to committee members:

- a. Site/Logistics: catering, music, AV, seating, parking, presentation of awards at event, hire photography/video company and coordinate.
- b. Sponsorships: recruit sponsors.
- c. Judging: judge selection/recruiting, judging forms and format, transportation of judges to projects entered.
- d. Entries: contact members to solicit entries, receive and review entries for accuracy, select and coordinate trophies, review and tabulate judging forms, review videos and photos to determine presentation arrangement at the event, determine sponsors for each award.
- e. Public Relations: send at least two (2) press releases announcing event and announcing winners to local newspapers; select and coordinate invitations and RSVPs.
- f. Miscellaneous: establish policy regarding late entries, late RSVPs and drop-ins at the event.

4. Venue Selection 4 months

Selecting the right venue can make the difference between having a successful event or not. Things to think about are:

- Are there any members or associate members who have a site they might offer for free in exchange for some publicity?
- What meal will you be serving? Lunch, dinner, appetizers? Will it be a sit down meal or will you have a happy hour and then separate seating for the actual award presentation?
- Will there be opportunity and room for members to network? If you're having a sit down dinner, consider having a no-host bar for at least an hour prior to beginning your event.
- Buffets provide ample opportunities for networking. An evening of appetizers and drinks also works well.
- Is there ample parking? Do you need valet parking?

IDEA: If you have a small chapter, consider joining efforts with an adjacent chapter to create a larger group.

5. Plaque Selection 4 months

Keep the plaque design simple: a nice, basic frame with a photo of the award-winning project (you will have photos taken for the judges). All information should be printed clearly, be easy to read and highlight the winning project and member company's name. You may want to print the name of the landscape architect or designer as well.

Note: Be sure to select these early to avoid any unforeseen delays. The award plaque is the 'prize' that the winners will take away from this event.

Note: If this is your first awards event, take time to define the category parameters (i.e., residential, commercial, maintenance, construction, under/over\$100,000, etc.) and names (i.e., special awards, Presidential awards, Special Mention, etc.)

6. Master of Ceremonies Selection 4 months

When selecting your Master of Ceremonies, keep the following in mind:

- Are they well known in your community?
- Will their presence help sell tickets?
- Can they provide you with additional PR by virtue of their job (i.e. newscaster, radio announcer or newspaper reporter).

7. Entry Solicitations Sent 3.5 months

Send entry information to members at least 3.5 months prior to the event containing the info below:

- Clear descriptions of the award types
- Amount of entry fee
- Guidelines for entry package contents
- Entry deadline

8. Recruit Sponsors 3 months

The committee member in charge of sponsorships contacts potential sponsors. Sponsorship opportunities include:

- Recognition in all promo material (i.e., emails, invitations, announcements, posted signs at the event.)
- Sponsorship of each award and sponsor name announced by MC as each award is given to winner (See *Sponsorship section for more information.*)

Beautification Awards — *continued*

9. Site Arrangements **3 months**

The committee member responsible for site arrangement will have arrangements made for the food, music, AV and video/photography presentation finalized three months before the event. The Site committee member is also in charge of coordinating the program for the event. (See no. 17 below).

10. Recruit Judges..... **3 months**

The committee member in charge of judges recruits judges and coordinates the schedule for judging day.

Note: All Judges may not be available on the same day. Keep this in mind when scheduling site visits. We recommend no more than 20 site visits per judge group per day.

11. Entries Deadline..... **2 months**

The committee member in charge of entries tracks the receipt of completed entries, reviews them for accuracy, and sends a complete record of monies collected to the Treasurer. They will also prepare evaluation forms to be given to the judges. Be sure to double check that each entrant is a member at the time of entry as well as at the time of the awards ceremony.

IDEA: If you find that there are not enough entries coming in, consider sending out a broadcast email encouraging submissions.

12. Design/Approve Invitations/PR **2 months**

- Consider using a template for your invitations that can be reused every year.
- Consider giving discounts to early bird RSVPs and/or increase cost for last-minute RSVPs.
- State clearly on the invitation your policy for late RSVPs and drop ins.
- Have an article announcing the event in your chapter newsletter including date, time and venue.
- Add the event to your chapter’s online calendar.

13. Judging Begins.....**6 weeks**

The committee member in charge of judges coordinates the logistics for judging day. They are responsible for: transporting judges and the photographer/videographer to each project, retrieving judging forms

to be returned to the committee member in charge of entries. After judging is complete and evaluations are tabulated, the committee member will coordinate a lunch meeting with the judges to review their findings and photographs/video to be shown at the event.

Note: Include maps/directions and extra scoring sheets in the judge’s packets.

14. Invitations Sent**4 weeks**

IDEA: Given enough notice, State representatives will attend other chapter events and lend support. Invite them early (and comp them, of course!).

15. Review RSVPs.....**3 weeks**

The committee member receiving RSVPs creates a form to be used at the event to check people in. It should include: name, company, how much is owed or has been paid. This form and the checks can then be turned over to the Treasurer.

IDEA: If you haven’t received an adequate number of responses, send out a broadcast email to the membership reminding them to respond or set up a phone tree and ask Board members to call members who have not responded.

16. Complete Plaques**3 weeks**

The committee member in charge of plaques coordinates their completion. They will supply the names, photos, etc. to the company preparing the plaques.

17. Encourage Attendance**2 weeks**

The committee member in charge of entries coordinates with the person in charge of RSVPs and verifies that winning companies are sending representatives to the event. If not, consider outreach to the winning companies encouraging attendance.

18. The Event

- **Staffing:** All committee members arrive at the site early enough to coordinate with caterers, musicians, seating, AV and parking.
- **Registration:** The registration table has at least two people to check in guests and collect any money due.
- **Sponsors:** The committee member in charge of entries determines which sponsors will sponsor which awards.

Beautification Awards — *continued*

- **Program:** The evening begins with at least one hour of drinks and networking. The committee member responsible for site arrangement begins the program, welcomes guests and introduces the Chapter President. The Chapter President then gives a State of the Chapter message and recognizes the committee and the judges. The committee member responsible for site arrangement then introduces the MC and the program begins.
- **Debriefing:** Committee members should hold a debriefing meeting no later than two weeks after the event to evaluate the success of the program and to discuss areas needing improvement.

At Every Event

- Have name badges (pre-printed if possible).
- Hang your sponsorship banner and/or acknowledge them in your printed material and at the event (*see Sponsorship section for more details*).
- Acknowledge state representatives and special guests.

Golf Tournaments

The Golf Tournament is an all day fun event starting with the golf game and ending with a meal and prizes. It's a great opportunity to build relationships, recruit new members and attract sponsors. This can be a money-making event for the chapter.

Timeline

Item	When/Weeks-Months Before Event
1. Budget Approval	Before January 1
2. Date Selection/PR	6 months
3. Special Insurance Coverage	6 months
4. Committee Selection	6 months
5. Venue Selection	4 months
6. Determination of Entry Fee	4 months
7. Letters Soliciting Sponsors	3 months
8. Letters Soliciting Door Prizes	3 months
9. Design/Selection of Invitations	2 months
10. Invitations Sent (two mailings)	2 months & 1 month
11. Review RSVPs	2 weeks
12. Make Pairings	1 week
13. Recruit Volunteers to Help at Event	1 week
14. The Event	

1. Budget Approval Before January

The budget for this event will be reviewed and tentatively approved by the incoming board's first meeting. At that time the board will:

- Decide if event is to make money or break even
- Review sponsorship opportunities (please see Sponsorship section)
- Review budget for previous year's golf tournament, if available
- Establish an estimated expenses for current year's event
- Establish projected revenues for current year's event and sponsorships
- Determine pricing for tickets
- Determine who will get comp tickets (i.e., CLCA State Reps, Chapter President, etc.)

Note: If you have a sponsorship program (please see Sponsorship section) you may have money available to underwrite a portion of your costs.

2. Date Selection/PR 6 months

Late spring and early summer are good times to schedule your chapter golf tournament. The calendar of events in your chapter newsletter should reference this event as soon as possible and continue to advertise it until the date of the event. Add this event to your chapter's online calendar.

Golf Tournaments — *continued*

IDEA: Consider sending a ‘Save the Date’ postcard or email to the membership as soon as a date of your event is determined. You may also send out a second reminder about two weeks before your invitations are sent.

3. Special Insurance Coverage..... 6 months

Does your event require special insurance coverage? Some events like golf, fishing, shooting range, etc. may need special insurance coverage. *Chapter organizers should contact CLCA headquarters as soon as event planning begins to learn if special coverage is needed.*

4. Committee Selection..... 6 months

The following tasks/elements need to be assigned to committee members:

- a. Tournament Director: in charge of all site logistics, general organization, invitations and tracking of RSVPs
- b. Sponsors/Door Prizes: in charge of soliciting sponsorships and door prizes

5. Venue Selection 4 months

The venue should be selected based on the following criteria:

- Convenience of location
- Golf course facilities to host meal following the tournament
- Greens fees

Note: Several venue choices may be brought to the Board for selection or the Board may delegate this choice to the Golf Tournament Committee. When venue selection is confirmed, Tournament Director will sign a contract and pay a deposit.

IDEA: If you have a small chapter, consider joining efforts with an adjacent chapter to create a larger group.

6. Determination of Entry Fee..... 4 months

The entry fee should cover at 90% of the following:

- Greens fee and cart
- Meals (light dinner, barbecue or buffet)
- Drinks (golf course may throw in drink tickets and have a drink cart available or you can set up cold drinks at tee boxes)
- Prize fund (1st, 2nd and 3rd place/flight, longest drive, closest to the pin)

- Door prizes (in addition to what will be collected from sponsors)
- Administrative costs (invitations/fliers)
- Special insurance coverage

7. Letters Soliciting Sponsors 3 months

Determine what sponsorship opportunities you will make available (tee box signs, longest drive, closest to pin, etc.). Send information with a deadline to respond by two weeks before the event.

IDEA: Consider contacting a car dealership in your area to sponsor a hole in one and give away a car. In exchange, offer them a round of golf.

8. Letters Soliciting Door Prizes 3 months

- Door prizes should be special and fun. Consider what your members enjoy doing — fishing, skiing, boating, camping, etc.
- Some examples of popular door prizes are: weekend getaways, golf equipment and supplies, gift certificates to sporting goods stores, specialty stores and restaurants.
- Avoid industry-specific products.
- Send information with a deadline to respond by two weeks before the event.

9. Design/Selection of Invitations..... 2 months

- Consider using a template for your invitations that can be reused every year.
- Be sure to include a map to the event location.
- Consider giving discounts to early bird RSVPs.
- State clearly on the invitation your policy for late RSVPs and drop-ins.
- Have an article announcing the event in your chapter newsletter including date, time and venue.

10. Invitations Sent 2 months & 1 month

Consider doing two mailings of invitations. The first can be an ‘official’ invitation and the second can be a card or flier type. RSVP deadline for entries should be no later than seven days before the tournament date.

IDEA: Given enough notice, State representatives will attend other chapter events and lend support. Invite them early (and comp them, of course!).

Golf Tournaments — *continued*

11. Review RSVPs.....2 weeks

Review your RSVPs. The committee member receiving RSVPs creates a form to be used at the event to check people in. It should include: name, company, how much is owed or has been paid. This form and the checks can then be turned over to the Treasurer.

IDEA: If you haven't received an adequate number of responses, send out a broadcast email to the membership reminding them to respond or set up a phone tree and ask Board members to call members who have not responded.

12. Make Pairings 1 week

Create foursomes and give the information to the golf course.

13. Recruit Volunteers to Help at Event..... 1 week

Recruit volunteers for the following:

- Work the registration desk.
- Set up sponsor signs.
- Set up drinks at tee boxes (unless there are drink carts).
- Sell door prize tickets and Mulligans.

14. The Event

Registration: Volunteers at registration table have the RSVP list and verify each person's registration and payment.

IDEA: Consider having a putting contest or giving range balls to early registrants. Door Prize Ticket and Mulligan Sales: Volunteers sell tickets for door prizes at registration and prior to meal and Mulligans.

IDEA: Give them a deal: sell 4 Mulligans for \$20.

IDEA: Have Board members help at the registration desk. Use the time to pay special attention to new members, potential members and sponsors.

After the Game:

- Score cards are turned in to Pro Shop for scoring and determination of longest drive and closest to pin winners.
- Guests can view door prizes and buy more door prize tickets.

During the Meal:

- Announce last call for door prize ticket sales.
- Chapter President greets guests and acknowledges sponsors.

- Award 1st, 2nd and 3rd prizes for each flight.
- Award door prizes.

Debriefing: Committee members should hold a debriefing meeting no later than two weeks after the event to evaluate the success of the program and to discuss areas needing improvement.

At Every Event

- Have name badges (pre-printed if possible).
- Hang your sponsorship banner and/or acknowledge them in your printed material and at the event (*see Sponsorship section for more details*).
- Acknowledge state representatives and special guests.

Help Us Help You!

Chapter Events/Online Calendars/CLCA Events Alert

When planning an event, be sure event information is consistent across all your promotional platforms and includes details — date, time, location, RSVP or registration information/links and any additional information that will encourage people to attend.

1. Promote your events in your chapter newsletter
2. Send emails to your chapter members
3. Post on social media
4. Post your event on your chapter's online calendar

Online Chapter Calendar

Your chapter already should have a Google calendar set up that syncs with the main calendar at clca.org/calendar and also may be incorporated into your chapter website. If your chapter does not maintain an updated website, you still can post calendar items so they appear on the calendar at clca.org/calendar. More info at clca.org/create-calendar.

Only chapter events that are on the CLCA online calendar will be considered for promotion in CLCA social media.

CLCA Events Alert — monthly email

We want people in the industry to see all the great things that are happening with CLCA! To assist chapters in promoting their events and reaching potential new members, the CLCA *Events Alert* email is sent near the end of each month. The *Events Alert* pulls info from the chapters' synced calendars. Please be sure to designate someone in your chapter to add items to the calendar, and provide them with all the pertinent information. CLCA Headquarters will send that person an 'Update Your Calendar' reminder each month.

Holiday Party

The Holiday Party is a social event that typically includes a meal and entertainment, and could also include a toy drive (or charitable offering). Since the holiday season is such a hectic time of year, schedule this event early in the season and give the venue, food and entertainment special consideration to attract the largest attendance and sponsorships possible. Dazzle your members!

Timeline

<u>Item</u>	<u>When/Weeks-Months Before Event</u>
1. Budget Approval	Before January 1
2. Date Selection/PR	9 months or more
3. Committee Selection	9 months
4. Venue Selection	9 months
5. Design/Approve Invitations/PR	3 months
6. Recruit Sponsors	3 months
7. Invitations Sent	4 weeks
8. Coordination of Decorations, Charitable Offering	4 weeks
9. Review RSVPs	3 weeks
10. The Event	

1. Budget Approval Before January 1

The budget for this event should be reviewed and tentatively approved by the incoming board's first monthly meeting. At that time the board will:

- Decide if event is to make money or break even
- Review sponsorship opportunities (please see Sponsorship section)
- Review budget for previous year's holiday party, if available
- Establish an estimated expenses for current year's event
- Establish projected revenues for current year's event and sponsorships
- Determine pricing for tickets
- Determine who will get comp tickets (i.e., CLCA State Reps, Chapter President, etc.)

Note: If you have a sponsorship program (please see Sponsorship section) you may have money available to underwrite a portion of your costs.

2. Date Selection/PR 9 months or more

It's never too soon to select the date for this event. Begin listing it in your calendar of events of your newsletter as soon as possible.

3. Committee Selection 9 months

The following tasks/elements need to be assigned to committee members:

- a. Site/Logistics: in charge of coordination with venue reps regarding catering and coordination of entertainment.
- b. Invitation selection, mailing and RSVPs: in charge of invitation design coordination, mailing and tracking of RSVPs.
- c. Sponsorships, decorations and charitable offering: in charge of recruiting sponsors, table decorations, selection of charity, collection of gifts and distribution to charity.

4. Venue Selection 9 months

Selecting the right venue can make the difference between having a successful event or not. Remember, this is the time to dazzle your members. Things to think about are:

- People are attending this party to celebrate and be entertained.
- What meal will you be serving? Lunch, dinner, appetizers? Will it be a sit down meal, buffet or will you have a happy hour?
- Will there be opportunity and room for members to network? If you're having a sit down dinner, consider having a no-host bar for at least an hour prior to beginning your event.
- Buffets provide ample opportunities for networking. An evening of appetizers and drinks also works well.
- Will you have music? Dancing? Can your venue accommodate the entertainment?
- Is there ample parking? Do you need valet parking?

Note: If you are having the event catered, select the caterer about six months in advance too. Be sure to sample the caterer's food before committing.

IDEA: If you have a small chapter, consider joining efforts with an adjacent chapter to create a larger group.

Holiday Party — *continued*

5. Design/Approve Invitations/PR 3 months

- This invitation should be attractive and stand out.
- If you are having a toy drive, make sure to mention what guests should bring and the charity it benefits.
- Be sure to include a map to the event location.
- Consider giving discounts to early bird RSVPs.
- State clearly on the invitation your policy for late RSVPs and drop-ins.
- Have an article announcing the event in your chapter newsletter including date, time and venue.

6. Recruit Sponsors 3 months

The committee member in charge of sponsorships contacts potential sponsors. Clearly state sponsorship levels and what they include. (See Sponsorship section for more information.)

7. Invitations Sent 4 weeks

IDEA: Given enough notice, many state representatives will attend other chapter events and lend support. Invite them early (and comp them, of course!). Board members: at the event, introduce State representatives to local members.

8. Decorations, Charitable Offering 4 weeks

- Contact suppliers who may be willing to supply Christmas trees and materials for table centerpieces.
- Purchase or recruit any necessary decorations.
- Recruit volunteers to help arrange decorations and centerpieces.
- Determine the charity to which you will donate toys.
- Coordinate delivery of toys to charity.

9. Review RSVPs 3 weeks

The committee member receiving RSVPs creates a form to be used at the event to check people in. It should include: name, company, how much is owed or has been paid. This form and the checks can then be turned over to the Treasurer.

IDEA: If you haven't received an adequate number of responses, send out a broadcast email to the membership reminding them to respond or set up a phone tree and ask board members to call members who have not responded.

10. The Event

Staffing: All committee members arrive at the site early enough to verify site arrangements, entertainment, etc.

Registration: The registration table has at least two people to check in guests and collect any money due.

IDEA: Ask board members and sponsors to help at the registration desk and bar. Pay special attention to new members, potential members and sponsors.

IDEA: Have votive candles in holiday bags showing the way to your party.

Program: The evening begins with at least one hour of drinks and networking. When the meal is served (or if a buffet, when everyone is seated), the Immediate Past President introduces the Chapter President. The Chapter President addresses the group, thanks sponsors (for this event and the past year), acknowledges special guests, including new and potential members, and then introduces the President Elect. The President Elect introduces the incoming Board of Directors and talks about the upcoming events in the new year. Entertainment can begin anytime before, during and/or after the meal.

IDEA: Tape a raffle ticket to the bottom of one chair at each table. Winner takes the centerpiece.

IDEA: Sell the donated Christmas trees.

Debriefing: Committee members should hold a debriefing meeting no later than two weeks after the event to evaluate the success of the program and to discuss areas needing improvement.

At Every Event

- Have name badges (pre-printed if possible).
- Hang your sponsorship banner and/or acknowledge them in your printed material and at the event (*see Sponsorship section for more details*).
- Acknowledge state representatives and special guests.

More Event Ideas

Tax Strategies Meeting

Schedule in February. Discuss business use of home, compensation of family members, auto lease/purchase and retirement.

Family Bowling Night and Board Installation

Fun, food, installation, prizes for adults and kids for high game and low game in each division: men, women, boys and girls.

Pond Night

Includes a presentation from nationally acclaimed pond builder and discussion on the ABC's of ponds and waterfalls, and future trends in the industry. Literature and handouts distributed.

Water Conservation

Everything you ever wanted to know about water conservation but were afraid to ask.

Technology for Successful Small Business Owners

Hire consultant to discuss what new technologies are available to enhance your business or services.

Family Night at the Movies

Combine this with an event that is typically dry like board elections. Meet prior to the movie and then provide popcorn and drinks along with the movie.

Supplier Showcase

Event features hands-on product demos with info about the new products out from a supplier. Invite crews and have sessions in Spanish available. Free BBQ lunch provided for members.

Vendor Expo

Join together with other chapters, rent a location and sell tables to vendors and then invite members.

Sports Team Events

Have fun with your chapter or with neighboring chapters by attending a football or baseball game — include pre-game tailgate party.

Lighting Demo

With a local lighting supplier. Hold raffle for lighting kit.

Local Parades

Enter a float in the local parade. Include free BBQ for those helping to build the float.

Fishing Trip

Charter a boat for the weekend with a set price including everything. Limit company spots so a good mix of people attend.

Day at the Races

Invite family and crews. Charge flat rate for admission and BBQ.

Putt Putt Golf Tournament

Fun for the whole family, this can replace or be in addition to your chapter's golf tournament.

Service Project

Collaborate with a local service organization or do it as a stand-alone chapter service project that ties into landscaping.

Be Creative!

Think of fun things you'd want to attend.

Does your event require special insurance coverage?

Some events like golf, fishing, shooting range, etc. may need special insurance coverage. Chapter organizers should contact CLCA Headquarters as soon as event planning begins to learn if any special coverage is needed.

A Short, But Important, Tip Sheet on Taking Proper Minutes

CLCA is a nonprofit corporation governed first by federal and state laws, then by CLCA bylaws and chapter bylaws.

Minutes are a legally required document for corporations showing what transpired and was decided during a board and/or committee meeting. Beyond being a legal document, minutes are used as the official record of decisions made and are good historical documents for your chapter or committee. Rarely, but occasionally, your minutes may be used as corroboration or evidence in legal matters. Keep this in mind as you write and later, your board approves, your minutes.

Your minutes need to be concise yet have enough detail to show that the board gave thoughtful discussion to agenda items, practiced proper parliamentary procedure, followed bylaws, and demonstrated the duties of care, loyalty and obedience that are required by law.

Minutes usually follow the script of the agenda presented and set by the president. Courtesy suggests that if a member wishes a topic outside the agenda be discussed, prior to the meeting the member would ask the president to list the item on the agenda with a time allotment.

The president or committee chair is not allowed to make motions but may cast a vote to create or break a tie.

For a board, minutes are critically important for documenting any financial concerns. If a treasurer's report was presented, the minutes should always include a statement about the report. The minutes would specifically mention the documents that the treasurer submitted for review (monthly financial report, bank statement, check ledger, etc.). The minutes should include a statement of any concerns the treasurer or board may have regarding the finances. This is all for the board's protection, as the board members are legally liable for the finances. At the end of the treasurer's report, a motion should be made and voted on that shows that the financial report was accepted by the board or moved into the record by the board.

Minutes of previous meetings must be approved by the board with a proper motion and vote. When the board approves the previous meeting's minutes, they are approving them for accuracy and clarification of any possible misunderstanding of what was discussed. It is customary that those not present for the meeting referenced in the minutes would abstain from voting.

It is not necessary the minutes be published, but all approved meeting minutes must be recorded with CLCA headquarters monthly.



Minutes — *continued*

What to Include in Minutes

- Time the meeting started and ended.
- Place of meeting.
- Date of meeting.
- If quorum was established. You cannot make motions or take votes without quorum. Unsure of what quorum is for your chapter? Check your chapter bylaws.
- Listing of who was in attendance and who was absent. This includes names of all board members plus the names and titles of any guests in attendance.
- The larger elements of a discussion.
- Approval of the previous meeting's minutes.
- Acceptance of the treasurer's report (if given).
- All motions and votes. Motions should be precisely worded.

What to NOT Include in Minutes

- The names of who made a motion or seconded a motion.
- The names of who voted which way — vote totals are ok (7 aye/2 nay/0 abstain) but a list showing who voted which way is not.
- Personal discussions that may have taken place at the meeting.
- Every single bit of the discussion ... minutes are not transcripts.

Sample Minutes

Association of Disney Fans
Meeting Minutes
Monday, November 11, 2019
Haunted Mansion – Anaheim, California

I. Call to Order

The meeting was called to order by President Mickey Mouse at 10:04 am.

II. Roll Call, Establish Quorum and Approve Agenda

Secretary Donald Duck called the roll.

Board members in attendance included:

Present—President Mickey Mouse, Vice-President Minnie Mouse, Secretary Donald Duck, Directors: Buzz Lightyear and Goofy

Absent – Treasurer Snow White, Directors: Pluto Dog and the Mad Hatter

Other members and guests included:

Cruella DeVille - Member

Secretary Duck indicated that quorum was established.

It was moved and seconded to approve the agenda as presented. The motion passed unanimously on a voice vote.

III. Approve Minutes from October 13, 2019 Meeting

Secretary Duck presented the minutes from the October 13, 2019 meeting for approval. Minnie Mouse noted that the minutes mistakenly showed her as absent and requested they be corrected.

It was moved and seconded to approve the minutes as corrected. The motion passed unanimously on a voice vote.

IV. Financial Report

As Treasurer Snow White was absent, President Mickey Mouse presented the most recent association financial report.

President Mouse noted that the association made more profit than budgeted for the recent Spring Fling Tea Party. He also noted that membership income was down nearly \$12,000 when compared to this time last year. The \$50,000 certificate of deposit held by the association is set to expire at the end of December and will either need to be renewed, moved into another CD or place the money into the association's bank account.

The board discussed options for the expiring certificate of deposit.

It was moved and seconded to renew the \$50,000 certificate of deposit for a term of one year. The motion passed.

Ayes: 3 Nays: 1 Abstentions: 0

It was moved and seconded to accept the financial report as presented. The motion passed unanimously on a voice vote.

V. Committee Reports

A. Technology Committee

Committee Chair Buzz Lightyear reported that the committee has been working to review and update the association's website and encouraged the board to send any suggested edits to him. The committee is near completion of the research on video chats and podcasts with the goal of presenting a report by the summer board meeting.

B. Events Committee

Vice-President Minnie Mouse presented the Events Committee report in place of Events Director, the Mad Hatter, who was absent. The Spring Fling Tea Party was a successful event with large attendance and achieved more profit than budgeted. The committee requested that the Spring Fling Tea Party become an annual fundraising event.

The board discussed the suggestion of making the Spring Fling Tea Party an annual event. Considerations included timing of the event, budgetary concerns, competing events and appropriateness.

It was moved and seconded that the Spring Fling Tea Party be held in 2020 and to consider the suggestion of it becoming an annual event after the 2020 event. The motion passed.

Ayes: 3 Nays: 2 Abstentions: 0

VI. New Business

Cruella DeVille presented the board with a request to form a committee of villains since one does not currently exist. Ms. DeVille provided a statement signed by twelve members who were interested in forming such a committee.

President Mouse thanked Ms. DeVille for her suggestion and reminded the board that, per the association's bylaws, new committees must have a minimum of twenty interested members to be established. Ms. DeVille indicated her intent to obtain the minimum number of interested members and present the list of members to the board at a future meeting.

President Mouse shared that the afternoon before the board meeting, he was contacted by an association member with issues of concern including some serious allegations against an association member. This complaint has not yet been filed in writing, as is required per the bylaws. Because of the limited time between the communication of these allegations and the board meeting, there was not enough time to conduct a fact finding and consult with legal counsel. President Mouse will work with the Executive Committee on this with the goal of having more in-depth information and legal advice to share at the next meeting. Due to the potential of needing to bring in legal counsel to advise the board, the next board meeting will likely be a closed session meeting where only board members and legal counsel may be in attendance. He urged all board members to remain silent on this and, throughout the process, maintain their duty of confidentiality as this is a delicate and, possibly, legal matter.

VII. Next Meeting and Adjournment

The board discussed the next meeting date and time.

It was moved and seconded that the next meeting be held on January 15, 2020 at a location to be determined. The motion passed unanimously on a voice vote.

The meeting adjourned at 11:30 am.

CALIFORNIA LANDSCAPE CONTRACTORS ASSOCIATION Chapter Affiliation Agreement

This Agreement is entered into as of this _____ day of _____, 20__ between the California Landscape Contractors Association, a California nonprofit mutual benefit corporation (CLCA) and undersigned (Chapter) with respect to the following:

A. CLCA is an association in the State of California whose overall purpose is to advance the landscape contractor profession.

B. The Chapter represents CLCA in the geographical area described below within the State of California and desires to be chartered by CLCA as its exclusive Chapter within that geographical area subject to the terms and conditions of this Agreement.

NOW, THEREFORE, the parties agree:

1. Charter. CLCA grants to Chapter the exclusive charter to operate as the CLCA Chapter in the geographical territory described as follows:

This grant shall become effective (or continued) as of the date of this Agreement and shall continue until suspended or terminated as provided below.

2. Name. CLCA licenses the use of the terms “California Landscape Contractors Association” and “CLCA” to the Chapter for use as the Chapter’s name, as follows: “California Landscape Contractors Association, _____ Chapter.” Chapter shall refer to itself as such in the conduct of its affairs. The license shall be effective as of the date of this Agreement and shall continue until it is suspended or terminated as provided below.

3. Logo. CLCA licenses the use of its logo to the Chapter for the purpose of identifying itself in conformance with the terms and conditions of this Agreement. The license shall be effective as of the date of this Agreement and shall continue until it is suspended or terminated as provided below.

Chapter acknowledges that breach of Chapter of one or more of their obligations under Sections 2 and 3 of this Agreement are likely to cause the CLCA to suffer irreparable harm, namely harm for which damages would be an inadequate remedy. Chapter further acknowledges that the CLCA is likely to suffer irreparable harm due to delay if, as a condition to obtaining an injunction, restraining order, or other equitable remedy with respect to such a break, were CLCA required to demonstrate that it would suffer irreparable harm. The parties therefore intend that if Chapter breaches one or more of their obligations under Section 2 or

3, then for purposes of determining whether to grant an equitable remedy any court will assume that that breach would cause CLCA irreparable harm.

4. CLCA Membership. All members and leaders of the Chapter must be members in good standing of CLCA.

5. Standards. The Chapter shall conform its activities to, and remain consistent with, the purposes of CLCA, as expressed in the CLCA Bylaws, Policies, and Code of Ethics, as amended from time to time.

6. Chapter Authority. Other than as set forth in this Agreement or by resolution or policy adopted by CLCA, neither party shall have the authority to direct or control the other except as specifically provided in this Agreement. Neither party shall have the authority to bind the other except as specifically provided in this Agreement. No partnership or joint venture is created by this Agreement.

7. Chapter Governance. Chapter shall follow the bylaws and governance requirements as set out by the then current CLCA bylaws and policies.

8. Chapter Operations. Chapter shall hold/conduct events and participate in CLCA activities as outlined below. These are minimum requirements and Chapter is encouraged to exceed such for the benefit of the members.

- A. Publish a newsletter or magazine at least four (4) times per year either in printed or electronic format.
- B. Hold/conduct at least four (4) events per year for the membership. Examples include: social gatherings, educational events, golf, beautification awards, service projects, and similar.
- C. Participate regularly in CLCA Membership Committee calls and work.
- D. Chapter President (*or his or her designee*) participates regularly as a member of the CLCA Chapter Presidents Council.
- E. Chapter President and Treasurer participate in CLCA's Leadership Day.
- F. Promote CLCA programs and activities through various communication methods including in-person promotion, print, email and social media.
- G. Participates in CLCA membership drives and campaigns.

9. Chapter Role in CLCA Governance. Chapter shall be eligible to participate in CLCA governance and leadership in the following ways, among others:

- A. Representation on Board with full voting rights via two representatives: the Chapter Presidents Council – North representative and Chapter Presidents Council – South representative.
- B. Eligibility to participate in the CLCA Chapter Presidents Council.
- C. Eligibility for participation in various CLCA committees and task forces.

10. Dues. CLCA shall collect all dues for CLCA. Dues shall be as determined by CLCA through its Board of Directors.

Chapter Affiliation Agreement

11. Insurance. CLCA may, at its sole option, procure general insurance for the Chapter. The Chapter will be responsible for determining whether those policies, if any, are adequate for the Chapter's particular needs. Chapter may obtain other or additional insurance as it deems appropriate, at its own cost.

12. Indemnification. Each party shall defend, indemnify, and hold harmless the other against any claim arising from the negligence or willful misconduct of the indemnifying party, its agents and employees in the performance of its own activities. Other than as may be provided by law, neither party shall be accountable to the other for punitive or exemplary damages, or damages related to loss of goodwill, lost profits, emotional distress or the like.

13. Programs, Activities and Materials. The parties shall inform each other of significant programs and activities to be presented to members and others. CLCA reserves the right to present programs in the Chapter territory. CLCA and the Chapter shall exchange education and informational materials produced by each. To the extent possible, CLCA and Chapter shall promote the other's germane events through various communication methods including print, email and social media.

14. Records and Reports. CLCA is required by law to report all activities, income and expenses of the Association, including those conducted at the Chapter level. As such, the Chapter agrees to keep such records and make such reports as CLCA may reasonably require. Chapter shall provide CLCA copies of its Board minutes and financial statements monthly. Chapter shall provide CLCA a copy of the Chapter bylaws annually or upon revision, whichever is sooner. Chapter shall provide a list of Chapter officers, directors and committee chairs upon request.

15. Contracting. Any legal agreements entered into on behalf of the Chapter should be approved by the Chapter Board or its designee and maintained on file with the Chapter. Such agreements may in no way bind CLCA or any other CLCA Chapter. Contracts that involve the use of the CLCA name or logo must be submitted to CLCA for prior written approval which shall be granted or denied within seven (7) days of request.

16. Tax Matters. The Chapter shall adopt the same accounting year as that of CLCA. As Chapters are not separately incorporated entities and exist under the CLCA corporate filing, CLCA shall file an annual tax return that includes the Chapter.

17. Probationary Status. Should the Chapter fall short of fulfilling the provisions set forth in this agreement, CLCA reserves the right to place the Chapter on probationary status and will communicate such in writing to the Chapter. Probationary status shall be for six (6) months and is for the purpose of rectifying such deficiencies in governance and/or operations within the Chapter. Probationary status will be determined by a two-thirds vote of the CLCA Board of Directors. Extension of Chapter probationary status is possible by a two-thirds vote of the CLCA Board of Directors. Chapters in probationary status are still expected to provide all necessary reports and information as outlined in this Agreement. During Probationary status, CLCA will endeavor to assist the Chapter in rectifying the identified deficiencies. If, after a probationary status period of at least six (6) months, the Chapter still does not fulfill the provisions set forth in this agreement, the matter will be turned over to the CLCA Board of Directors for action. Board action may include, but is not limited to, terminating this Agreement or dissolving and re-establishing the Chapter and its Board.

18. Termination. Either party to this Affiliation Agreement may terminate this Agreement and any of the benefits conferred under it with sixty (60) days written notice to the other party. CLCA may terminate this Agreement based on a good faith determination and three-fourths vote by the CLCA Board of Directors that the Chapter has substantially breached any of the provisions of this Agreement or has or is taking actions prejudicial to the interests of CLCA. A Chapter may terminate this Agreement for any or no reason by vote of a majority of its members. In the event of termination, each party shall be obligated to fulfill its responsibilities set forth in this Agreement through the date of final termination, including all reporting responsibilities, and maintain records of all Chapter transactions and activities for a period of not less than four (4) years from the date of termination. At the time of termination, any remaining monies in the Chapter financial accounts shall be remitted to CLCA. CLCA shall hold such funds separate from the general fund for a period of two (2) years and use such funds for the purpose of providing start-up funds should a new chapter establish in the same area. After two (2) years, the funds shall be transferred to the CLCA general fund for the purpose of serving all CLCA members.

19. Review and Revisions. This Agreement may be revised or amended only by a written document executed by both parties.

IN WITNESS WHEREOF, the parties have entered into this agreement as of the day and year first above written.

CLCA: California Landscape Contractors Association, a California nonprofit mutual benefit corporation

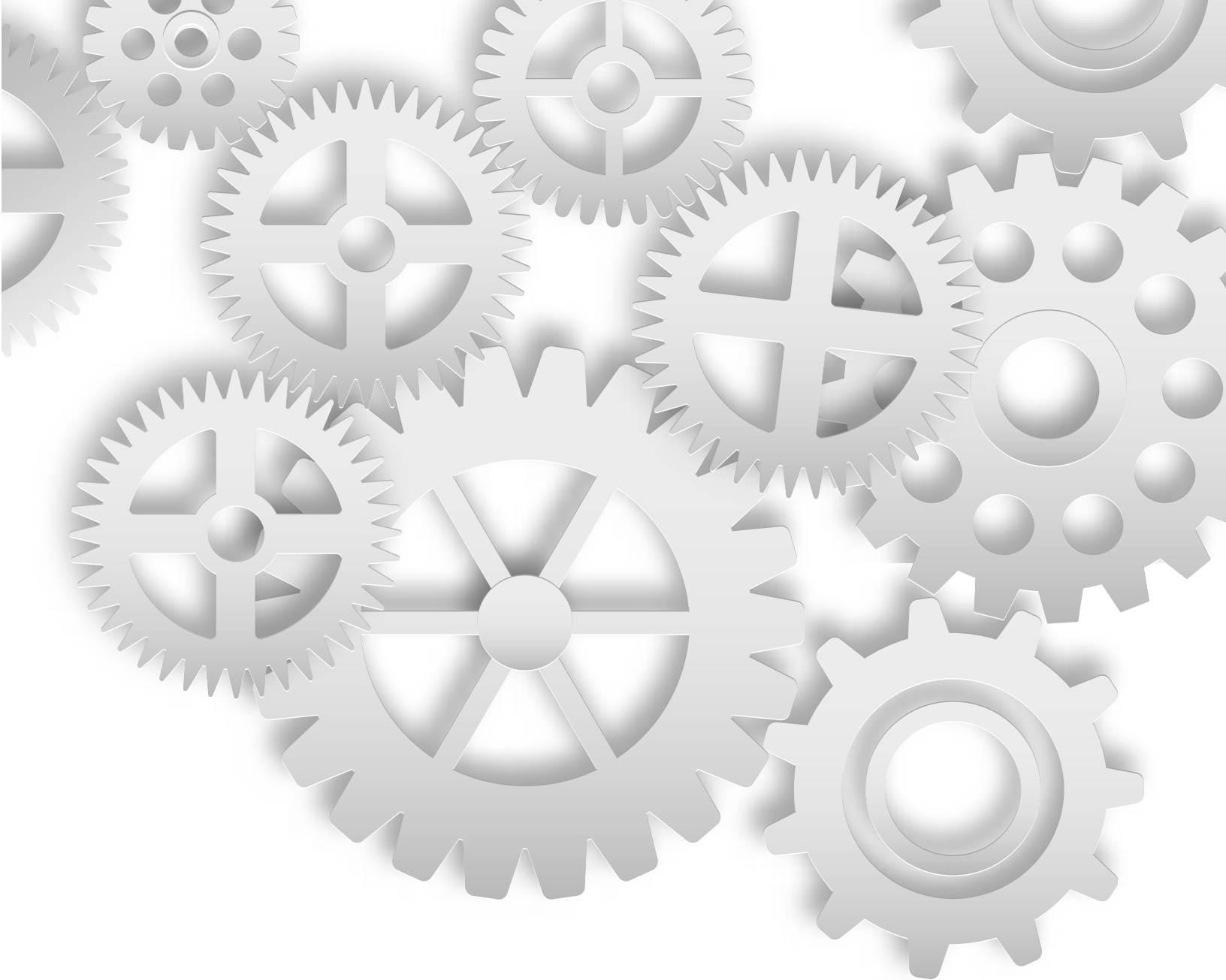
By: _____

Title: _____

_____ Chapter

By: _____

Title: _____



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