*SAMPLE* Chapter Meeting Agenda

- Call to Order
- Pledge of Allegiance
- Roll Call
- **Reading of the Minutes:** Ask for additions or corrections. If none, minutes stand approved as read. If some, minutes stand approved as amended. (No motion is necessary.)
- **Treasurer’s Report:** Ask for additions or corrections. If none, the report stands approved as read. If some, the report stands approved as amended. (No motion is necessary.)
- **Communications:** Secretary reads letters or correspondence received by the Chapter. Treasurer submits any bills.
- **Officer’s Reports:** If applicable, the President and Vice President may report on any pertinent information.
- **Committee Reports:**
  - Membership
  - Nutrition/Education
  - Legislation
  - Others (such as Nominating, etc.)
- **Unfinished Business:** Action from previous meetings
- **New Business**
- **Program:** Introduced by the Program Chair.
- **For the Good of the Order:** Issues unrelated to agenda brought by members.
- **Adjournment:** President asks for a motion to adjourn (no second or a vote is needed) “If no objections, meeting stands adjourned.”
Simple Meeting using basic Robert’s Rules of Order

Call the meeting to order

Welcome all board members / introduce guests

Approval of minutes
   The minutes of the previous meeting have been distributed. Are there any corrections to the minutes? If there are no (further) corrections, accept a motion to approve the minutes as distributed (corrected).

Reports (these are examples of how to ask)
   May we have the Treasurer’s report.
   The chair recognizes the chairman of the Membership Committee for a report.
   Does the Program Committee have a report?

Old Business
   Under old business, the first item of business is …

New Business
   Is there any new business?
   Is there any further new business?

Adjournment
   Since there is no further business, accept a motion to adjourn, second, vote. Then say, the meeting is adjourned.

Motions
   When a motion has been moved and seconded, the chair then states the question on the motion: It is moved and seconded that … (repeat the motion)
   The motion is now “on the floor” and is open to debate and action.
   The question is on the adoption of the motion that (repeat or clearly identify the motion).
   Those in favor of the motion, say aye.
   PAUSE
   Those opposed, say no.
   PAUSE
   The ayes have it and the motion is adopted.
   OR
   The no’s have it and the motion is lost.
ALABAMA SCHOOL NUTRITION ASSOCIATION BY-LAWS

ARTICLE I

Name

The name of this organization shall be the Alabama School Nutrition Association, which is an incorporated, nonprofit association, hereinafter referred to as the Association.

ARTICLE II

Object and Purposes

1. Promote the optimal health, nutrition and education of all children by supporting nutritionally adequate and educationally sound, financially accountable, nonprofit child nutrition and school community nutrition programs.
2. Promote high standards of child nutrition and school community nutrition programs with emphasis on nutritionally adequate meals that are appealing to children.
3. Promote united efforts between school personnel, allied organizations, industry and the public to assure every child an opportunity to receive the benefits of the child nutrition and nutrition education programs.
4. Promote high standards and provide appropriate education programs, incentives and recognition for professional development of child nutrition personnel.
5. Promote research and development in child nutrition programs.
6. Promote the establishment of state and national nutrition policies and legislation which provide optimal nutrition and nutrition education for children.
7. Promote the involvement of students and the school community in child nutrition programs.
8. Promote membership and provide services to members.
9. Take any and all actions authorized to corporations organized not for profit under the laws of the state of Alabama and the Internal Revenue Code to carry out the objects and purposes of the Association.
ARTICLE III
Membership

Section A. Classes of membership.
Membership shall consist of four classes – individual, associate, school district owned, and sustaining
1. Individual: owned by an individual; not transferable
   a. category shall consist of:
      i. employees
      ii. managers
      iii. directors / supervisors / specialists
      iv. educators employed in eligible fields
2. Associate Members:
   a. category shall consist of:
      i. retired members
      ii. students enrolled in post-secondary food, nutrition, health or other food related programs
      iii. industry consultants
      iv. corporations
      v. other individuals and nongovernmental organizations committed to furthering the goals of the Association
3. School District Owned: owned by a school district; transferable within listed category
   iii. employees
   iv. managers
   v. directors / supervisors / specialists
   vi. educators employed in eligible fields
4. Sustaining
   a. Individual owned
   b. Corporate owned

Section B. Dues.
1. Until such time as dues are changed by the House of Delegates, members shall pay state dues of $10.00. Twenty-five percent (25%) of each member's state dues shall be set aside by the Treasurer for the appropriate district. Dues for sustaining members shall be determined by the Executive Board.
2. Collection Procedure.
   a. Dues for all members shall be submitted to the School Nutrition Association's National Office. Dues for sustaining members will be paid for a calendar year, billed by the Treasurer, and paid directly to the Treasurer. Partial year dues may be prorated.

Section C. Rights and Privileges of Membership.
All Individual and School District owned members
1. whose dues are currently paid by December 31, shall be entitled to vote for the election of officers and to vote on any matter submitted to the voting membership.
2. shall be eligible for nomination to state elected office as specified in Article V, Section B
3. shall be eligible to attend the meetings of the House of Delegates as observers.
4. shall not hold both an individual and School District Owned membership concurrently
5. Exceptions By Class
   a. Individual membership
      i. Members who cease to be employed in an eligible field may continue their membership until their renewal date
   b. School District Owned Membership
      i. Reserve the right to change to individual membership at any time
   c. Associate membership
      i. Shall not be eligible for nomination to state elective office
      ii. Shall be non-voting members
   d. Sustaining Membership
      i. Shall be entitled to vote for the election of industry representatives to the Executive Board. Individual sustaining members shall be entitled to one vote and corporate sustaining members may designate two representatives to have one vote each
Section D. Membership Expulsion.

1. Suspension or revocation of membership or privileges of membership for cause: In accordance with the mission and vision of ASNA, and its responsibilities to its members and the public, the Executive Board may suspend, revoke or terminate any membership, and privilege or membership or any participation in ASNA programs or activities for conduct which is contrary to the purposes of the Association, or in conflict with its policies. Any proceeding for suspension, revocation or termination or membership, privileges or membership or participation in ASNA activities shall be conducted in good faith and in a fair, nondiscriminatory and reasonable manner, consistent with applicable law and regulatory requirements for non-profit corporations and the bylaws. In taking any action authorized by this provision, the officers shall be entitled to rely on competent expert advice, facts disclosed by investigation, admissions or any other reasonable evidence, but shall not be required to observe particular federal or state rules of evidence or judicial procedures.

ARTICLE IV
Organizational Structure


1. Composition.
   a. The voting delegates shall include the elected officers, the elected section chairmen, the Treasurer, the standing committee chairmen, the five immediate Past Presidents, and delegates from the districts to be based on district membership.
   b. Each voting delegate must be an active member of the Association.
   c. The immediate Past President shall serve as Chairman of the House of Delegates and will appoint a Parliamentarian for the House of Delegates.

2. Responsibilities.
   a. Formulates the philosophies and goals of the Association.
   b. Debates and reviews matters of professional interest to the Executive Board.
   c. Makes general and specific recommendations to the Executive Board.
   d. Reviews reports of the Executive Board members and committee chairmen.
   e. Takes action on proposed resolutions and amendments to the Bylaws.

   a. All voting delegates must be certified by the Chairman of the House. Each Delegate may cast only one vote. All votes must be in person.
   b. A majority vote of the delegates seated is required for all voting except for amending the Bylaws and changing the membership dues.

4. Quorum.
   a. Two-thirds (2/3) of the total number of official delegates shall constitute a quorum.

5. District Delegate Representation.
   a. District Delegates shall be based on the number of members in each district using the follow formula:
      i. 10-50 members 1 delegate (District Chairman)
      ii. 51-100 members 2 delegates (District Chairman and District Chairman-Elect)
      iii. 101 plus members 2 delegates (District Chairman and District Chairman-Elect) Plus one delegate elected by the district for each 50 members or Faction thereof above 100
   b. At least 60 days prior to the annual conference, the Membership Chairman or Designee will use the official membership record provided to the Nominating Committee for mailing ballots and will send notices to the Chairman of the House and the District Chairmen stating the number of members in each district.
   c. The Chairman of the House will use the official membership record to determine the number of delegates for each district. At least 45 days prior to the annual conference, the Chairman of the House will notify each District Chairman of the number of delegates in their district.
   d. At least 30 days prior to the annual conference, the District Chairman will provide the Chairman of the House a list of the names and addresses of members elected or designated by position to serve as official district delegate(s) from the district. Alternate delegates may be elected to serve in the event an official district delegate cannot serve. Delegates from districts may not be appointed or represented by proxy.
Section B. Executive Board. The Executive Board ("Board") shall be the executive body of the Association. The Board shall formulate policies between meetings of the House; adopt the annual budget; receive and/or act on reports; approve resolutions; conduct the business affairs and have all other powers and duties specifically provided to it by the By Laws.

1. Composition.
   a. Voting members of the Executive Board shall include the elected officers, elected section chairmen, chairmen of standing committees, Treasurer, Past President and District Chairmen.
   b. District Chairmen-Elect and special committee chairmen may attend Board meetings as nonvoting members.
   c. The State Administrator of Child Nutrition Programs and State Advisor for the Association shall be ex-officio members of the Board.
   d. All members of the Board shall be members of the Alabama School Nutrition Association and the School Nutrition Association.

2. Responsibilities.
   a. Direct Association affairs in accordance with the philosophies, general policies, and goals adopted by the House.
   b. Consider general and specific recommendations made by the House.
   c. Appoint persons and/or employ persons to act on behalf of the Association and define their specific responsibilities.
   d. Adopt the annual budget for the Association, including but not limited to, the budgets for all state meetings of the Association.
   e. Manage and direct the financial affairs of the Association. Approve the investment of the Association’s money. Approve the fiscal year. Fiscal year shall be August 1 through July 31.
   f. Authorize persons to sign checks, contracts, and other documents on behalf of the Association. Arrange for bonding such persons, as it may deem necessary to manage the funds of the Association.
   g. Approve organizational structure and job descriptions for all members of the Executive Board.
   h. Approve all committee appointments.
   i. Fill vacancies of unexpired terms of Executive board members unless otherwise specified.
   j. Review and approve the program for all state conferences and seminars.
   k. Adopt a Plan of Action each year consistent with School Nutrition Association plan of action for the ensuing year.
   l. Recommend positions and policies to the House.
   m. Provide leadership in working with allied associations and groups, which share a similar purpose.
   n. Establish criteria and approve membership for honorary members.
   o. Approve any joint venture with other organizations for the purposes of holding a Food Nutrition Exposition. Designate appropriate Executive Board members and committee chairmen to represent the Association in the planning and holding of any such exposition.

3. Quorum.
   a. Two thirds (⅔) of the total number of voting members shall constitute a quorum.

Section C. Executive Committee.

1. Composition.
   a. Members shall consist of the elected officers, the elected chairmen and the Treasurer. The State Advisor shall serve as ex-officio member of the committee.

2. Responsibilities.
   a. Propose to the Board administrative and management policies of the Association business consistent with the actions and policies established by the Board and the House.
   b. Conduct all business referred to it by the Board.
   c. Act in emergencies when time does not practically permit a meeting of the Executive Board as determined by the president. No action shall be taken which conflicts with actions of the House of Delegates or By-laws of the Association.
   d. Review the annual budget as drafted by the Treasurer and the Budget and Audit Committee.
   e. Review the financial status of the Association.
   f. Analyze reports.
   g. Employ a certified public accountant who shall annually, or as needed, audit the Association’s accounts.
   h. Report all actions taken to the Board.

3. Quorum.
   a. Five members of the committee shall constitute a quorum for the transaction of Association business.

Section D. District Affiliates. The state of Alabama shall be divided into nine districts. Each district shall be represented on the Executive Board by a District Chairman as a voting member and by a District Chairmen-Elect as a nonvoting member.

1. Only active members of the Alabama School Nutrition Association and the School Nutrition Association shall be eligible to represent a district in any official capacity.
2. District Bylaws shall not conflict with state Bylaws.
3. The portion of state dues set aside for district use may be requested from the Treasurer in writing by the District Chairman or Chairman-elect pursuant to the board approved Accounting and Financial Policy & Procedure Manual. Accurate and complete financial records of the use of these district funds will be maintained for five (5) years and made available to the Budget and Audit Committee for audit purposes if requested.

Section E, Sections. The Association shall consist of sections according to the special type of food and/or nutrition activities in which members are engaged. Each section shall have a chairman as herein provided.

1. Single Unit Personnel Composed of child nutrition personnel assigned to one school, and/or child nutrition personnel who have responsibilities in a kitchen that serves more than one school, and/or child nutrition personnel who have responsibilities in more than one school but are not employed on a system-wide basis.

2. Multiple Unit Personnel Composed of child nutrition personnel who are responsible for administration and/or supervision of child nutrition programs for a city or county school system or the State Department of Education.

Section F, Committees.

1. Terms.
   a. Committee Chairmen shall be appointed by the President to serve for the same term as the President.
   b. Chairmen may be reappointed by a succeeding President; however, an individual may serve as chairman of the same committee for no more than three consecutive years without express approval of the Executive Board.
   c. The President may appoint committee members to serve for the same term as the President or delegate the responsibility of appointing committee members to a committee chairman unless otherwise specified.
   d. Standing committee chairmen shall be voting members of the Executive Board and of the House of Delegates. Other committee chairmen shall be nonvoting members of the Executive Board unless otherwise specified.

2. Eligibility.
   a. The chairman and members of a committee shall have expertise in the subject area of the committee on which they serve.
   b. All Chairman and committee members shall be active members of the Alabama School Nutrition Association and the School Nutrition Association.

3. Activities.
   a. The committees shall develop plans of action in keeping with the School Nutrition Association’s Plan of Action.
   b. Actions of the committees shall not be in conflict with the policies, positions and By-laws of the Association.
   c. Committee meetings shall be called by the committee chairman.

4. Standing committees. There shall be the following standing committees of the Association:
   a. Nominating This committee shall consist of the two elected section chairpersons and a chairman appointed by the President with the approval of the Executive Board.

Responsibilities:
   i. Survey membership for potential candidates.
   ii. Verify eligibility of candidates.
   iii. Select two candidates for each position to be filled.
   iv. Election of the Association officers will be determined by a written ballot. The Executive Board shall determine the timeline for elections and the notification of results at the first (change-over) meeting of the Executive Board each year and provide the determined timeline to the Nominating Chair at that meeting.
   v. Counts the ballots. The chairman of the committee shall serve as the official teller and shall open and count the ballots at a meeting with the other two committee members or the proxies. In case of a tie vote the committee will establish a random and objective method to determine the winning candidate.
   vi. Notifies the candidates of the election results.

b. Public Policy and Legislative. This committee shall consist of a Legislative Chair, a Legislative Co-Chair, and a Legislative Aide. The four elected Association officers shall serve as ex-officio members of the committee and shall be sent notice of all committee meetings. All three members of the PPL Committee shall be appointed by the Association president beginning with the 1999-2000 school year and shall serve as follows:
   Legislative Chair: The Chair shall serve one year and rotate out of the position.
   Legislative Co-Chair: The Co-Chair shall serve one year as Co-Chair and rotate to the Chair position the following year.
   Legislative Aide: The Aide shall serve a total of three years on the PPL Committee: one year as Aide before rotating to the Co-Chair position the following year, and then to the Chair position the next year. Beginning with the 2000-2001 school year and each school year thereafter, the Association president will appoint only a Legislative Aide.

Responsibilities:
   i. Evaluate, interpret, recommend and respond to state and federal legislation and regulations.
   ii. Inform the membership of current legislation.
   iii. Conduct an annual assessment of legislative needs.
   iv. Assist districts in the development of legislative strategies and plans of action.
v. Develop and implement a plan of action with supporting budget, which meets Association legislative needs.

vi. Coordinate state legislative efforts with the School Nutrition Association legislative activities and goals.

vii. Inform and update districts on legislation pertaining to child nutrition on related matters.

viii. Develop and maintain a viable and effective communication network with allied groups for the immediate dissemination of legislative information.

ix. Seek support from allied groups to secure sound child nutrition legislative information.

x. Establish rapport with member of the U. S. Congress and the Alabama Legislature and continuously inform them of the values and need of child nutrition programs.

xi. Organize lobbying efforts for legislation to provide maximum federal, state and local funds for the support of child nutrition programs.

xii. Promote legislation to assure optimum child nutrition programs and to improve and protect the status of child nutrition personnel.

xiii. Oversee the planning of state legislative events.

xiv. Establish state goals.

c. Professional Development This committee shall coordinate all professional development activities of the Association.

Responsibilities:

i. Develop ideas for professional growth of the membership subject to the approval of the Board.

ii. Prepare and make available to the members an annual summary of certification developments and programs relating to certification.

iii. Maintain liaison with appropriate state and federal agencies and professional associations and organizations.

iv. Work with district representatives to promote certification programs.

v. Approve courses of study, workshops and meetings for certification credit.

d. Nutrition Standards and Nutrition Education This committee shall promote the improvement of nutrition standards and assist with nutrition related programs, projects and activities of education benefit to child nutrition programs and the Association.

Responsibilities:

i. Evaluate and interpret nutrition trends and developments.

ii. Recommend nutrition standards for Child Nutrition Programs.

iii. Promote nutrition education.

iv. Prepare and make available to the members an annual summary of developments relating to nutritional aspects of child nutrition programs.

v. Work with district representatives to promote nutrition education activities and improve nutrition standards.

vi. Promote the involvement of youth and parents in child nutrition programs

vii. Recommend to the Executive Board policies and procedures for establishing and promoting the Nutrition Advisory Council

viii. Publicize youth and parent involvement activities

e. Resolutions and Bylaws This committee shall receive and/or draft proposed resolutions and amendments to the Association Bylaws for consideration.

Responsibilities:

i. Review all resolutions for format and for consistency with the Bylaws.

ii. Review the Bylaws annually to ensure consistency with current Association philosophy and recommend changes.

iii. Review resolutions and By-law amendments proposed by the committee or others and make recommendations to the House for consideration.

iv. Obtain an official list of delegates from the Chairman of the House and mail copies of all proposed resolutions and By-law amendments to each delegate at least fifteen (15) days before a scheduled meeting to the House.

v. Review district by-laws for consistency with state bylaws.

f. Membership This committee shall promote membership in the Alabama School Nutrition Association and the School Nutrition Association.

Responsibilities:

i. Recommend to the Executive Board policies and procedures pertaining to the implementation of a membership program.

ii. Promote membership through district representatives and assist districts in developing membership drives.

iii. Analyze membership trends and recommend appropriate action.

iv. Official Association membership records will be maintained by the designee of the Executive Board.

v. Provide the chairman of the nominating committee a list or mailing labels for members as of December 31st.

vi. Provide the chairman of the House of Delegates and the District Chairmen the number of members in each district at least sixty (60) days before the annual conference.

vii. Provide a membership list or mailing labels to the Publications Chair for mailing the newsletter.
g. Public Communications. This committee shall coordinate all public relations activities related to the child nutrition programs and the Association.

Responsibilities:
   i. Recommend to the Board policies and procedures concerning the public information program.
   ii. Evaluate and interpret Association public information efforts with district representatives.
   iii. Work toward creating a positive image for the Association and the child nutrition programs.
   iv. Coordinate plans and media publicity for National School Lunch Week, National School Breakfast Week and National Nutrition Month.

5. Special Committees. There shall be the following special committees of the Association. Other special committees may be appointed as needed by the President with approval of the Executive Board.
   a. Publications. This committee shall publish the Association newsletter.

Responsibilities:
   i. Publish at least two issues of the newsletter annually.
   ii. Solicit articles from district representatives, committee chairmen and members.
   iii. Establish deadlines for submitting copy for publication.
   iv. Obtain mailing labels from the membership chairman and make arrangements for having the newsletter printed and mailed to all members.

b. Scholarship and Awards. This committee shall award scholarships to qualified applicants and recommend to the Executive Board the names of members to receive other awards for excellence, such as the Louise Sublette Award, to be given in the name of the Association.

Responsibilities:
   i. Recommend to the Budget and Audit Committee an amount of money to be budgeted annually for scholarships.
   ii. Award scholarships to qualified applicants who make written application to the committee. Awards will be made for attendance at accredited Alabama institutions or for correspondence courses approved by the committee. All recipients shall undertake programs of study that shall prepare them for leadership positions in child nutrition programs. Actual payment of scholarships will be made to the recipient or institution of an amount designated by the committee, not to exceed actual cost of tuition and textbooks. To continue on scholarship, a recipient must re-apply for another scholarship after successfully completing a term (quarter or semester) of study. The total value of scholarships awarded annually shall not exceed the amount of money allocated for scholarships in the budget for the year. Funding will be on a term, quarter or semester basis. An individual member shall be awarded no more than three scholarships.
   iii. Publicize available state and national scholarships and awards in the state newsletter and at the annual conference.
   iv. Coordinate plans for recognizing scholarship and award recipients at the annual conference with the conference program chairman.

c. Program of Work. In the spring, this committee shall develop a Program of Work for the next year consistent with the School Nutrition Association’s Plan of Action and needs of the state and districts. The President Elect shall serve as chairman and Vice-president shall represent the Association at the School Nutrition Association’s Leadership Conference.

Responsibilities:
   i. Plan and conduct a Leadership Training Seminar for newly elected officers, newly appointed committee chairmen, district chairmen and district chairman-elect.
ARTICLE V
Officers

Section A. Elected Officers. The elected officers of the Association shall be a
1. President
2. President-elect
3. Vice-president
4. Recording Secretary
5. Multi-unit Chairman
6. Single-unit Chairman

Section B. Elections. The election of officers shall be conducted by the Nominating Committee in accordance with the bylaws.
1. Notification of the slate of candidates, along with an absentee ballot request form, shall be provided by the Nominating Chair on the ASNA website or another more economical method by December 31.
2. These officers shall be elected by paper ballots cast by eligible members at the Annual Conference and by absentee ballots received by the determined cut-off date.
3. The majority of votes cast shall constitute an election.

Section C. Eligibility. All elected officers shall be active members of the School Nutrition Association and the Alabama School Nutrition Association.
1. Vice President
   a. The nominee for Vice-President shall have served as a voting member of the Executive Board within the last five years.
   b. Shall have attended three of the last five Annual State Conferences
2. Section Chairmen
   a. The nominee for Section Chairman shall be employed and hold membership in the appropriate section at the time of nomination, election and term of office
   b. Shall have attended three of the last five Annual State Conferences
3. Recording Secretary
   a. Shall have served on a Standing Committee or Special Committee within the last five years
   b. Shall have attended three of the last five Annual State Conferences
4. No member shall be eligible to simultaneously hold more than one elected office but may be appointed to chair a special committee.

Section D. Terms of Office
All elected officers shall assume office at the end of the School Nutrition Association’s Annual National Conference.
1. President: The President shall be the chief elected officer and shall serve for one year. Upon completion of the term of office, the president shall become a past president of the Association.
2. President-elect: the President-elect shall serve for one year
3. Vice-President: The Vice-President shall be elected annually and serve for one year
4. Recording Secretary: The Recording Secretary shall be elected in even numbered years and shall serve for two years.
5. Section Chairmen
   a. Single-unit Chair: The Single Unit Chair shall be elected in odd numbered years and shall serve for two years
   b. Multi-unit Chair: The Multi-Unit Chair shall be elected in even numbered years and shall serve for two years
6. Industry Representative: The industry representative shall be elected in odd numbered years by individual and corporate sustaining members only and shall serve for two years.

Section E. Responsibilities of Officers
1. President
   a. Represents the Association in policy matters and is the chief spokesperson
   b. Serve as Chair of the Executive Board and the Executive Committee
   c. Calls and preside at meetings.
   d. Prepares the agenda for Executive Board and Executive Committee meetings.
   e. Serves as ex officio member of all committees except the nominating committee.
   f. Appoints chairmen and committee members in accordance with bylaws.
   g. Implements the Plan of Action and makes application for the appropriate award (gold, silver, or bronze) presented to states by the School Nutrition Association.
   h. Represents the Association in the School Nutrition Association’s House of Delegates.
   i. Plans and conducts a leadership-training workshop for incoming officers and Executive Board members prior to the beginning of term as President.
2. President-elect
   a. Studies the duties and responsibilities of the President, other members of the Executive Board, committees and district chairman.
   b. Represents the Association at the School Nutrition Association’s House of Delegates.
   c. Serves as the Program Chairman for the annual conference.
   d. Performs the duties for the President in the President’s absence.
   e. Succeeds to the office of President
      i. At the end of the second State Conference following election; or
      ii. In the event the President cannot fulfill the duties of the office
3. Vice-President
   a. Performs the duties of the President-Elect in the President-Elect’s absence.
   b. Coordinates all activities of standing committees, except the Nominating Committee, and the Industry Advisory Board.
   c. Perform other duties as assigned by the Executive Board.
   d. Serves as first alternate delegate or third delegate to the School Nutrition Association’s House of Delegates.
   e. Succeeds to the office of President-Elect
      i. At the end of the first State Conference following election; or
      ii. In the event the President-elect cannot fulfill the duties of the office
4. Recording Secretary
   a. Accurately records all minutes of the House, the annual Association Business meeting, Executive Board meetings and Executive meetings.
   b. Provides copies of minutes to Executive Board members within fifteen days of meeting via email or website.
   c. Maintains minutes of the Association in a permanent form and pass document to the succeeding recording secretary within ninety (90) days of election.
5. Section Chairmen
   a. Promotes the Association’s Plan of Action.
   b. Initiates, implements and/or coordinates appropriate studies or projects with the approval of the Executive Board.
   c. Expresses views of their section.
   d. Provides leadership, support, and technical assistance and resource lists of materials to members.
   e. Plans a section meeting for the annual state conference in cooperation with President-Elect.
   f. Promotes membership.
   g. Serves as a member of the Nominating Committee.

Section F. Appointed Officers.
The appointed officers of the Association shall be the
1. Treasurer,
2. State Advisor,
3. Parliamentarian
4. Others as needed.

Section G. Eligibility.
All appointed officers shall be members of the Alabama School Nutrition Association and the School Nutrition Association.
1. Treasurer: shall have working knowledge of finance and budgeting
2. State Advisor: shall be a member of the State Department of Education Child Nutrition Program Staff
3. Parliamentarian: shall be the immediate past president

Section H. Terms of Appointed Officers
All appointed officers shall assume office at the end of the School Nutrition Association’s Annual National Conference
1. Treasurer: The Treasurer shall be the chief financial officer of the Association. The Treasurer shall be appointed annually, employed by the Executive Board and serve at the pleasure of the Board.
2. State Advisor: The State Advisor shall be appointed annually by the President and approved by the Executive Board
3. Parliamentarian: The Parliamentarian shall serve for one year.
4. Others: The President may appoint other officers as necessary with approval of the Executive Board. These appointed officers shall serve for one year.
**Section I. Responsibilities of Appointed Officers**

1. **Treasurer**
   a. Shall implement financial policies of the Executive Board and House of Delegates.
   b. Serve as Chairman of the Budget and Audit Committee.
   c. Supervise and monitor Association funds, investments and securities.
   d. Receives all monies for the Association and disperses all funds as directed by the Executive Board and in accord with the bylaws.
   e. Maintains full and accurate accounts of all income and disbursements in office books belonging to the Association.
   f. File required documents and/or tax returns with the State of Alabama and the Internal Revenue Service.
   g. Present records for audit annually as directed by the Executive Board.
   h. Keep Association records up-to-date and promptly transfer them to a succeeding Treasurer.

2. **State Advisor**
   a. Advise and make recommendations to officers, committee chairmen and the Executive Board as to policies, procedures and efficient administration of the Association.

3. **Parliamentarian**
   a. Advise the Executive Board and President in regard to parliamentary procedures for all meetings.

4. **Other**
   a. Performs duties as assigned by the President and Executive Board.

**Section J. Filling Vacancies of Elected Officers**

1. In the event that an elected officer other than the President and President-elect cannot fulfill the duties of the office, first consideration shall be given to the other candidate on the ballot for that office.

2. In the event this candidate does not accept the appointment, the Executive Board will seek recommendation from the Nominating Committee and then vote on the recommendation.

3. Appointments are for the remainder of the term of the vacated office.

**Section K. Removal from Office**

Any officer who is found in violation of conditions required for election, a breach of rules of the Association, or failing to work under the framework of the Association may be removed from office. A person may be removed for valid cause by a two-thirds vote of the Executive Board present and voting whenever it is deemed that the best interest of the Association would be served thereby.

**ARTICLE VI**

**Meeting, Expenses and Delegates**

**Section A. Type of Meetings.**

1. **State Conference.**
   a. There shall be an annual state conference, the date and place of which shall be determined by the Board.

2. **Business Meeting.**
   a. There shall be an annual business meeting of the members of the Association at the annual conference for the purpose of considering reports and the transaction of other business as may properly come before the membership.

3. **House of Delegates.**
   a. There shall be a meeting of the House of Delegates at the annual state conference.

4. **Executive Board.**
   a. One or more Executive Board meetings shall be scheduled during the annual state conference. A minimum of two other Executive Board meetings shall be held during the year at the call of the President.
   b. The Executive Committee shall meet just prior to each Executive Board meeting and at the call of the President in the event of an emergency.
   c. Leadership Training Workshop.
   a. A Leadership Workshop will be held for incoming Executive Board members after the National Leadership Conference (NLC).
   d. Special Meetings.
   a. Special Meetings, workshops and seminars may be called or approved by the Board.
Section B. Expenses. The Association’s policies for reimbursement of expenses for members of the Executive Board, Committee Chairmen and others to attend meetings or work conferences shall be determined by the Executive Board. However, expenses for attending the annual state conference will not be paid for any member of the Association unless specifically authorized by the Executive Board. Other expenses of officers, committee chairmen and other members will be paid or reimbursed only if they are approved in the annual budget or if the Executive Board votes to fund the particular expenditure. Members claiming reimbursement shall provide invoices, receipts or other documentation of the expenditure(s).

Section C. Delegates. The President and President-Elect shall be the first two official delegates to the School Nutrition Association’s Conference. The Vice-President will serve as first alternate or third delegate. The Recording Secretary shall serve as second alternate or fourth delegate, and the Treasurer as third alternate or fifth delegate. Actual expenses for delegates shall be paid up to the amount designated in the budget; however, expenses will not be paid for a person whose expenses are paid by another group or agency. Delegates to other meetings will be approved by the Executive Board.

ARTICLE VII
Resolutions and Amendments

Section A. Method of Proposal. Amendments to these bylaws may be proposed in writing no later than January 1 in any one of the following ways:
1. At the official request of a district.
2. By majority vote of the Executive Board.
3. By written petition signed by 5% of the membership.

Section B. Procedure-Bylaws Amendments. These bylaws may be amended in one of the following ways provided copies of the proposed amendments have been mailed or distributed to all members of the House of Delegates at least fifteen (15) days prior to the annual meeting of the House or the deadline date for casting mail ballots.
1. At the annual meeting of the House of Delegates with a two-thirds affirmative vote of the delegates present and voting.
2. By a two-thirds affirmative vote of the mail ballots returned by the members of the House of Delegates.

Section C. Procedure-Resolutions.
1. All proposed resolutions to be considered at the annual state conference shall be submitted to the Chairman of the Resolution and Bylaws Committee in writing postmarked no later than February 1. Upon consent of a majority of the delegates a resolution may be submitted from the floor of the House.
2. Proposed resolutions submitted by February 1 shall be mailed to all members of the House of Delegates at least fifteen (15) days prior to a scheduled meeting of the House.
3. Adoption of proposed resolutions shall require a simple majority vote.
4. Resolutions which are in conflict with the bylaws will not be presented in the House.

Section D. Conflicts in Bylaws.
1. In the event that these bylaws are found to have provisions which conflict with the School Nutrition Association’s bylaws, the School Nutrition Association’s bylaws will be followed until such time as the Alabama School Nutrition Association’s bylaws can be amended to comply with the School Nutrition Association’s bylaws.
2. In the event the bylaws of a district are found to have provisions which conflict with the Alabama School Nutrition Association’s bylaws, the Alabama School Nutrition Association’s bylaws will be followed until the district bylaws are amended to comply with the Alabama School Nutrition Association’s bylaws.

ARTICLE VIII
Parliamentary Authority

The current edition of Robert’s Rules of Order Newly Revised governs this Association in all Parliamentary situations and for the conduct of all meetings.
ARTICLE IX
Definition/Membership Information

Section A. Nonvoting Member. Individuals without voting privileges.

Section B. District Affiliate. Organized school food service district affiliates made up of Association members from a group of contiguous counties within the state.

Section C. Eligible Field. A field listed below.
1. Persons employed in a nonprofit food and nutrition program which serves meals to children at the preschool, school, school district, college, state or federal levels.
2. Persons engaged in teaching or administration at the aforementioned levels.
3. Persons engaged in teaching present or potential school food service personnel.

Section D. Noneligible Field. Any field other than those defined in Section C.

Section E. Nonprofit. Any school food and nutrition program maintained by a school food authority for the benefit of children, all of the income from which is used solely for the operation or improvement of such service and exempt from income tax in 501(C) 3 Internal Revenue Code of 1954, as amended.

Section F. Standing Committees. Groups of individuals appointed by the President charged with the responsibility of planning and implementing activities to promote their particular area of emphasis in the Association's Plan of Action.

Section G. Membership Information. Counties included in each district are as follows:

District 1  Colbert, Cullman, Franklin, Lauderdale, Lawrence, Limestone, Morgan, Winston
District 2  Blount, Jackson, Madison, Marshall
District 3  Fayette, Greene, Hale, Lamar, Marion, Pickens, Sumter, Tuscaloosa, Walker
District 4  Jefferson, Shelby
District 5  Calhoun, Cherokee, Cleburne, DeKalb, Etowah, St. Clair, Talladega
District 6  Autauga, Bibb, Butler, Chilton, Choctaw, Dallas, Lowndes, Marengo, Perry, Wilcox
District 7  Bullock, Chambers, Clay, Coosa, Elmore, Lee, Macon, Montgomery, Randolph, Russell, Tallapoosa
District 8  Baldwin, Clarke, Conecuh, Escambia, Mobile, Monroe, Washington
District 9  Barbour, Coffee, Covington, Crenshaw, Dale, Geneva, Henry, Houston, Pike
For an electronic copy of this handbook and more resources for state leaders:
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For questions or concerns, please contact the State Affiliate Relations Manager at (800) 877-8822 x174 or StateSupport@schoolnutrition.org.
Chapter 1:
Connecting with SNA National
Dear State President,

**Congratulations on becoming the president of your SNA state association!** It is my pleasure to personally thank you for your dedication to SNA, the school nutrition profession, and the students you ensure are well-nourished and prepared for success every day. We greatly appreciate your commitment and your leadership.

Your year as President should be an *exciting* one! You’ll work with great people in your state, network with other school nutrition professionals from across your state and the country, and have the chance to learn and make an impact.

In this handbook, you’ll find information to help you feel confident and prepared for your year as a state leader. State board member job descriptions, strategic planning guidance, membership recruitment and engagement techniques are right here at your fingertips.

Along with this handbook, we have a network of leaders and staff at SNA who are ready to assist you, help you connect to your peers, and provide you with the materials and knowledge you’ll need for a successful year. Your SNA Regional Director is a great resource for you! Your SNA Regional Director is a main link to the national SNA and can help you navigate your new position. Check Chapter 1 to find out how to get in touch with your Regional Director.

The State Affiliate Relations Manager at SNA is your main link to the SNA headquarters office. You can reach the State Affiliate Relations Manager at StateSupport@schoolnutrition.org or (800) 877-8822 x174. They will be happy to help you with any questions you have or connect you to someone who can.

I hope you have a productive, impactful, and FUN year as your state association’s president! Remember- you are not alone. SNA, your state board, past and future leaders are all here to help. Again, thank you and congratulations.

Sincerely,

**Dr. Becky Domokos-Bays, SNS**

2015-16 SNA President Elect
SNA At-A-Glance

SNA Headquarters
School Nutrition Association
120 Waterfront Street, Suite 300
National Harbor, MD 20745-1142

www.schoolnutrition.org
www.facebook.com/SchoolNutritionAssociation
www.twitter.com/SchoolLunch

Your Main Point of Contact at SNA Headquarters
SNA State Affiliate Relations Manager
Email: StateSupport@schoolnutrition.org
Telephone:
(800) 877-8822 x174
(301) 686-3074

SNA Service Center
(800) 877-8822
(301) 686-3100
Fax: (301) 686-3115
servicecenter@schoolnutrition.org

Please feel free to contact the State Affiliate Relations Manager with any questions or concerns you may have. The manager will answer your question or get you in contact with someone who can help you.
State Affiliate Support Services

SNA’s commitment to being the leading resources on SNA member benefits, professional development and industry trends extends to also providing quality customer service and up-to-date information to the state associations. To assist in the efforts to provide meaningful and positive experiences for our members, SNA provides the following support to state associations:

Online State Support Center

SNA has created a special section of the SNA website just for state leaders. You may access it via this link: [www.schoolnutrition.org/StateSupport](http://www.schoolnutrition.org/StateSupport). Resources include:

**Membership Resources**
- Membership Recruitment Toolbox with tools and membership videos
- SNA Awards Program resources
- My Account Guide for State Leaders
- Star Club resources

**Governance Resources**
- State Leadership Handbook
- Current SNA bylaws & strategic plan
- All state association bylaws

**Professional Development Resources**
- Certificate Program resources
- SNS resources

**Conference Resources**
- Effective Practices to Increase the Number of Exhibitors
- Requesting SNA National Leaders to attend and present
- Welcome Video from SNA President
- Ready-to-use presentations

**Chapter Resources**
- Chapter Leaders’ Handbook
- Chapter Meeting Ideas & tools for running meetings
- Sample Bylaws
- Board Job Descriptions
- Budgeting Tools
- Planning Tools

**Newsletter Resources**
- Ready-to-use ads about SNA programs for your newsletters and other publications
- SNAC Bites archives

**Website Resources**
- SNA Web Brand & Styleguide
- SNA Logo Standards & Guidelines
- Form to request a state association logo, designed by SNA
- Banner ads to promote SNA programs on your state association website

This section is Members-Only and requires you to login to access it. If you need assistance logging in, please contact StateSupport@schoolnutrition.org or (301) 686-3074.
National Leadership Conference
The National Leadership Conference (NLC) is an invitation-only event for state leaders, which takes place in March or April of each year. NLC provides current and future state and national leaders with the opportunity to learn critical information about successfully leading a nonprofit association, to network with other leaders from across the country, and to gain new skills to become a more effective and engaging leader.

SNA encourages state affiliates to send incoming Presidents, Presidents-Elect, and Vice-Presidents, along with State Association Executives, to this event. The state association is also welcome to send any other interested state board members, such as the Membership Chair, Conference Chair or Secretary/Treasurer.

Future Leaders Program, in conjunction with National Leadership Conference
Held in conjunction with NLC, the popular SNA Future Leaders Program provides hands-on training to new and future leaders of SNA. Future Leaders are given the opportunity to network with other emerging SNA stars from across the country, hone their leadership and communication skills, and learn from seasoned SNA leaders in a fun and interactive learning environment. Individuals must be nominated by the state association. Each state association may send up to three individuals to this program.

Membership Support
SNA National Headquarters provides state affiliates with a wide range of membership support services, including:

- Direct to National Membership Processing
- Membership Applications
- Membership Brochures
- Online Membership Rosters via My Account
- Membership Drives for states and members

Please see Chapter 3 in this handbook for details.

SNAC Bites E-Newsletter
The SNAC (SNA-Communication) Bites newsletter is a monthly e-newsletter from SNA Headquarters designed to provide state affiliates with information bites on the latest programs and services. SNAC Bites are emailed directly to State Presidents, State Presidents-Elect, State Vice Presidents, State Association Executives, State Newsletter Editors and the SNA Board. SNAC Bites are sent as a word document to make copying and pasting easy.

Please note: members do not receive SNAC Bites directly from SNA. SNAC Bites are only sent to state and national leaders. It is your responsibility to share the relevant information with your members on a monthly basis through your state newsletter, magazine, email blasts, Facebook page, and website.

For a year-long SNAC Bites archive, go to www.schoolnutrition.org/SNACbites.
SNAC Chat Webinars

SNAC (SNA-Communication) Chats are webinars for state and national leaders covering the latest programs from SNA, new member services and other hot topics to help state leaders. SNAC Chats are held on a quarterly basis and are invitation-only.

All State Presidents, State Presidents-Elect, State Vice Presidents, State Membership Chairs and Processors, State Certificate Chairs and Processors, State Association Executives, State Newsletter Editors, and State Legislative Chairs are invited to participate via email from the State Affiliate Relations Manager. Please feel free to invite other members of your board and committees to participate.

General Support

If you ever have questions or concerns about governance, who to contact at SNA national, your responsibilities as a state leader, or more, you may contact the State Affiliate Relations Manager at StateSupport@schoolnutrition.org or (301) 686-3074. The Manager is your main point of contact at SNA national and can help answer your questions, act as a sounding board for guidance, and connect you with the right individual at SNA headquarters.

Legislative Support

The Government Affairs and Media Relations Center assists SNA members and affiliates in crafting policy, supporting legislative initiatives, and responding to any policy, regulations, or bills that might impact child nutrition programs at the State Level. The Center also tracks all legislation introduced in states and keeps SNA members updated as bills move forward and can assist with creating testimony or letter campaigns.

Check out the SNA Policy Page for a collection of tools geared towards state policy as well as reports on Smart Snacks Fundraisers, Meal Reimbursements and Mandates, and summaries of each state legislative year.

State Conference Support

SNA policy provides for a visit by the SNA president or other SNA board member to each state association once every 4 years at SNA’s expense AND for each state’s SNA Regional Director to visit the states in his or her region once during his or her 2 year term at SNA’s expense. During the state visit, the SNA leader may present at an annual state conference or attend a different state event, such as a strategic planning event. For more information, go to the end of this chapter.

Public Image and Marketing Tools

SNA has multiple school nutrition programs and events to help SNA members promote their school nutrition programs to students, parents, school administrators, and the community. Information about each program (along with a tutorial of social media) is available at the end of Chapter 3 in the Marketing Matters section.
**Credentialing Exam Promotion, Materials and Proctors**

SNA offers the SNS exam to state associations to host for their members. By completing the Exam Site Request Form and submitting it to SNA headquarters at least 60 days prior to the desired exam date, SNA will coordinate the test hosting with your state association. To download the form and find out more information, go to [http://schoolnutrition.org/Credentialing/HostTheSNSExam/](http://schoolnutrition.org/Credentialing/HostTheSNSExam/).

When hosting the SNS exam, your state will need to assign a Primary and Secondary Proctor from a list of prospects who meet the requirements to proctor the SNS Credentialing Exam. Please contact our Credentialing Staff at certsns@schoolnutrition.org to request a list of pre-approved proctors for your state!

SNA will promote the exam for your state association on the SNA website, as well as provide you with the necessary materials and support to host the exam.

**Other Publications**

*SNA SmartBrief* is published by the editors of SmartBrief on behalf of SNA and for school nutrition professionals. Each weekday, receive a daily snapshot of school nutrition news from leading news sources across the country.

*SN Direct* is a bi-weekly e-newsletter. Sign up for SN Direct and we'll deliver a summary of the latest child nutrition news to your e-mail account every two weeks.

*Tuesday Morning* is SNA’s policy and awareness newsletter. Each Tuesday, this newsletter provides members with up-to-date federal legislative news, as well as current state legislative activity.
SNA Glossary of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>ACDA</td>
<td>American Commodity Distribution Association</td>
</tr>
<tr>
<td>AND</td>
<td>Academy of Nutrition and Dietetics</td>
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<tr>
<td>ANC</td>
<td>Annual National Conference</td>
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<tr>
<td>ASAE</td>
<td>American Society of Association Executives</td>
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<tr>
<td>CACFP</td>
<td>Child and Adult Care Food Program</td>
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<td>CEU</td>
<td>Continuing Education Units</td>
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<tr>
<td>CNM</td>
<td>Child Nutrition &amp; Management</td>
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<tr>
<td>DDS</td>
<td>District Directors &amp; Supervisors</td>
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<tr>
<td>FNS</td>
<td>Food &amp; Nutrition Services</td>
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<tr>
<td>FRAC</td>
<td>Food Research Action Committee</td>
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<td>FLP</td>
<td>Future Leaders Program</td>
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<tr>
<td>GCNF</td>
<td>Global Child Nutrition Foundation</td>
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<tr>
<td>HACCP</td>
<td>Hazard Analysis and Critical Control Point</td>
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<tr>
<td>HHFKA</td>
<td>Healthy Hunger-Free Kids Act</td>
</tr>
<tr>
<td>JCN&amp;M</td>
<td>Journal of Child Nutrition &amp; Management</td>
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<tr>
<td>LAC</td>
<td>Legislative Action Conference</td>
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<tr>
<td>MCD</td>
<td>Major City Directors &amp; Supervisors</td>
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<tr>
<td>NACUFS</td>
<td>National Association College &amp; University Food Service</td>
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<tr>
<td>ICN</td>
<td>Institute of Child Nutrition (formerly NFSMI-National Food Service Management Institute)</td>
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<tr>
<td>NLC</td>
<td>National Leadership Conference</td>
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<td>NRA</td>
<td>National Restaurant Association</td>
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<td>NSBW</td>
<td>National School Breakfast Week</td>
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<td>NSLP</td>
<td>National School Lunch Program</td>
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<td>NSLW</td>
<td>National School Lunch Week</td>
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<tr>
<td>PAC</td>
<td>Political Action Committee</td>
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<td>POA</td>
<td>Plan of Action</td>
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<td>PP&amp;L</td>
<td>Public Policy &amp; Legislation Committee</td>
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<tr>
<td>PR</td>
<td>Public Relations</td>
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<tr>
<td>RD</td>
<td>Registered Dietician</td>
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<tr>
<td>SBP</td>
<td>School Breakfast Program</td>
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<tr>
<td>SCK</td>
<td>School Community Kitchens</td>
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<tr>
<td>SDM</td>
<td>School District Owned Membership</td>
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<tr>
<td>SNA</td>
<td>School Nutrition Association</td>
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<tr>
<td>SNF</td>
<td>School Nutrition Foundation</td>
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<tr>
<td>SNIC</td>
<td>School Nutrition Industry Conference</td>
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<td>SNS</td>
<td>School Nutrition Specialist</td>
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<tr>
<td>SNU</td>
<td>School Nutrition University</td>
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<tr>
<td>USDA</td>
<td>United States Department of Agriculture</td>
</tr>
<tr>
<td>WIC</td>
<td>Supplemental Nutrition Program for Woman, Infants and Children</td>
</tr>
</tbody>
</table>
**MIDEAST:** Delaware, Indiana, Maryland, Michigan, Ohio, Washington, D.C., West Virginia

**MIDWEST:** Illinois, Iowa, Minnesota, Missouri, Nebraska, North Dakota, South Dakota, Wisconsin

**NORTHEAST:** Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont

**NORTHWEST:** Alaska, Idaho, Montana, Oregon, Washington, Wyoming

**SOUTHEAST:** Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee, Virginia

**SOUTHWEST:** Arkansas, Colorado, Kansas, Louisiana, Oklahoma, Texas

**WEST:** Arizona, California, Hawaii, Nevada, New Mexico, Utah
SNA Regional Directors

SNA Regional Directors are members of the SNA Board of Directors who act as the primary link between state associations and SNA for all of the states in their assigned region. SNA Regional Directors are available to answer your questions, provide you with support, and bring your concerns and successes back to SNA National.

SNA Regional Directors are in office for two or three year terms, with half of the Regional Directors turning over each year. Each Regional Director’s term is listed after his or her name.

**Northeast**
Debbi Beauvais, SNS (2014-16)
Gates Chili and East Rochester Schools
Rochester, NY
Deborah_Beauvais@gateschili.org
(585) 750-1102

Gail Koutroubas
Andover Public Schools
Andover, MA
gkoutroubas@aps1.net
(978) 623-8622

**Midwest**
Lori Danella, SNS (2015-17)
Lees Summit R-7 School District
Lees Summit, MO
lori.danella@lsr7.net
(816) 986-2206

**Northwest**
Debbie Kallio (2014-16)
Sedro-Woolley School District
Sedro Woolley, WA
dkallio@swsd.k12.wa.us
(360) 856-1303

**Southwest**
Reginald Ross (2015-17)
North Carolina Department of Public Instruction
Charlotte, NC
reginald.ross@dpi.nc.gov
(704) 598-5337

**Mideast**
Jessica Shelly, SNS (2015-17)
Cincinnati Public Schools
Cincinnati, OH
shellyj@cps-k12.org
(513) 363-0800

**Midwest**
Lori Danella, SNS (2015-17)
Lees Summit R-7 School District
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lori.danella@lsr7.net
(816) 986-2206

**Northwest**
Debbie Kallio (2014-16)
Sedro-Woolley School District
Sedro Woolley, WA
dkallio@swsd.k12.wa.us
(360) 856-1303

**Southwest**
Kevin Ponce, SNS (2014-17)
Mid-Del Schools
Midwest City, OK
kponce@mid-del.net
(405) 739-1611 ext. 2235

**West**
Angela Haney, SNS (2015-17)
Los Lunas Schools
Los Lunas, NM
akhaney@llschools.net
(505) 866-2490
SNA National Leadership
State Visitation Policy and Schedules

SNA National Leadership State Visitation Policy
Hosting a national board member at your state conference or other meeting is a great way for your members to connect with the national SNA, network with a national leader and hear a presentation on a topic of interest and updates from SNA from a respected, experienced individual. The purpose of the state visit is to:

- Promote understanding of and support for SNA’s mission and vision
- Strengthen the SNA/state association partnership
- Encourage effective communication between SNA leaders and state association
- Connect SNA leaders to members across the country
- Provide support to state associations, as needed and appropriate

SNA policy provides for a visit a SNA officer to each state association once every 4 years at SNA’s expense AND for each state’s SNA Regional Director to visit the states in his or her region once during his or her term at SNA’s expense, as follows:

- **SNA Board of Directors** (includes President, President‐Elect, Vice President, Secretary/Treasurer, and other Board Members): SNA will pay 100 percent of the expenses for one designated Board of Directors member to attend a state association function once in a 4-year period. Expenses for any additional visits to state association functions during this time period will need to be 100 percent paid for by the state association.

- **SNA Regional Directors**: SNA will pay 100 percent of the expenses for a regional director to attend one meeting or function in each state in his or her region during his or her term.

- **SNA Headquarters Staff**: States may request that a SNA Headquarters Staff member attend a state function. Expenses for visits to state association functions by staff will need to be 100 percent paid for by the state association.

Please note that visits by SNA Board of Directors and SNA Regional Directors will be made based on the schedules issued by SNA each year (see pages 4 and 5). If a SNA Board of Directors member and a SNA Regional Director are scheduled to visit in the same year, only the SNA Board of Directors member will visit. The SNA Regional Director will visit the state in another year within their term, if possible.
How to Request a National Leadership Visit to Your State:

1. Consult the below schedules to see if your state is scheduled to host a national board member or your regional director. If a SNA Board of Directors member and a SNA Regional Director are scheduled to visit in the same year, only the SNA Board of Directors member will visit. The SNA Regional Director will visit the state in another year within their term, if possible. Based on availability and scheduling conflicts of SNA National Leaders, the schedules issued by SNA are subject to change.

2. Complete the **SNA National Leadership State Visitation Request Form** and submit to SNA headquarters at StateSupport@schoolnutrition.org **at least 6 months before the requested conference date**, or **as soon after August 1st of each year as possible**. Please note that even if you are scheduled to host a national leader, you MUST complete the Request Form to confirm the visit will occur.

3. Once SNA has confirmed that the visit and has given you the name of the SNA Leader visiting, complete and submit the **SNA National Leadership State Visitation Logistics Form** to StateSupport@schoolnutrition.org. **This form must be submitted at least 60 days before the conference.**

By 60 days out from the conference you must confirm:
- Schedule/agenda of the conference
- Dates and times of SNA National Leader’s presentation(s)
- Topics of SNA National Leader’s presentation(s)
- Transportation to and from the conference venue
- Names, offices, and phonetic spellings of incoming and outgoing officers for Installation of Officers
- Hotel reservations for the SNA National Leader (SNA will pay for the room; however, the state association should book the room.)

The state association must provide AV and copies of handouts, as needed. Please note that SNA will not pay a registration fee for the SNA National Leader visiting a state conference paid for by SNA.

SNA National Leaders are only available to attend the state function for 1 ½ days (does not include travel time), due to increasing limitations on travel outside school districts. Weekends are preferred.

**What the SNA National Leader May Present:**
SNA recommends the national leader attend your annual state conference and present the following:
- SNA Update at the General Session (20 to 30 minutes)
  - SNA recommends having PowerPoint capability available to the SNA National Leader (includes laptop, projection screen, projector)
- Installation of Officers
  - SNA requires that names, offices, and phonetic spellings of incoming and outgoing officers for Installation of Officers be sent to SNA at least 60 days before the conference
- One presentation at an education breakout session (a list of presentations is available from SNA on the **SNA National Leadership State Visitation Logistics Form**)
  - SNA recommends having PowerPoint capability available to the SNA National Leader (includes laptop, projection screen, projector)
  - If handouts or presentation are required, state association is responsible for printing.

Please discuss directly with SNA headquarters and the national leader attending your conference.

**How to Host a National Leader at Your State Conference or Meeting:**
Before the conference, please be sure to:
• Register the SNA National Leader for your state conference. (SNA will not pay a registration fee.)
• Create a name-badge for the SNA National Leader to ensure they may go to all events at the state conference.
• Choose someone to welcome the SNA National Leader and provide them with materials/answer questions for the conference/show them the venue and where presentations will take place.

During the conference, please be sure to:

• Welcome the SNA National Leader and provide them with materials/answer questions for the conference/show them the venue and where presentations will take place.
• Double-check that AV needs are met for SNA National Leader’s presentations.
• Invite SNA National Leader to events taking place during the conference while they are in attendance (including special events, receptions, etc.).

After the conference, please be sure to:

• Call or email the National Leader to thank them for the visit.
• Provide feedback to SNA headquarters about the SNA National Leader’s visit.
SNA National Leadership State Visitation Schedules

The schedule of visits is arranged in two calendars- one for the SNA Board of Directors and one for the SNA Regional Directors. The calendars are subject to change to accommodate SNA’s budget parameters and the schedule constraints of SNA’s volunteer leaders.

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SNA National Leadership Visitation Request Form

Please complete and submit this form to request that a SNA Board Member or Regional Director attend and present at your state conference at least 6 months before the conference date, or as soon after August 1, 2016 as possible, to StateSupport@schoolnutrition.org.

SNA staff will notify you once a national leader is confirmed to attend and coordinate the logistics of the visit with the state contact. SNA National Leaders may attend your conference for 1.5 days (does not include travel time), due to increasing limitations on time spent away from the school district.

State Conference Information:
Please provide information about the state conference at which the National Leader will attend.

State: _________________________________________

Type of Meeting: _________________________________________
(i.e. annual state conference, leadership training, equipment academy, etc.)

Conference Theme (if applicable): _________________________________________

Conference Start Date: ________________ Start Time: ____________________

Conference End Date: ________________ End Time: ____________________

Date(s) and Time for which SNA Leader should plan to attend:
Start Date: ____________________ Start Time: ____________________
End Date: ____________________ End Time: ____________________

Location:
Venue Name: _________________________________________

Address: _________________________________________
City: ____________________ State: ____________________

Point of Contact Information:
Please provide information about the main point of contact in your state for this conference.

Main Point of Contact’s Name: _________________________________________

Association Title: _________________________________________
(i.e. President, President-elect, Executive Director, Conference Chair, etc.)

Work Phone Number: _________________________________________

Cell Phone Number: _________________________________________

Email Address: _________________________________________
SNA National Leadership Visitation Logistics Form

Please submit the form at least 60 days before the conference date to StateSupport@schoolnutrition.org to ensure that SNA can make the necessary arrangements for the SNA National Leader attending your event.

State: ____________________________________________

Contact Person: ______________________________________

**Travel Information:**

Please provide information about traveling to your state conference to help SNA facilitate making travel arrangements for the SNA National Leader.

**Closest Airport:** ______________________________________

How far is the airport from the hotel and venue? ______________________________________

Will you arrange transportation from the airport to the hotel via taxi or shuttle?

☐ Yes

☐ No

If yes, please provide the name and contact information for the individual or service picking up the SNA leader from the airport.

**Name:** ______________________________________

**Cell-Phone Number:** ______________________________________

**Back-Up Name:** ______________________________________

**Back-Up Cell-Phone Number:** ______________________________________

If no, what transportation would you recommend the SNA leader use?

________________________________________

**Lodging Information:**

Please provide information about the hotel at which the SNA leader will be staying.

**Hotel Name:** ______________________________________

**Hotel Address:** ______________________________________

**City:** ______________________________________

**State:** ______________________________________

**Hotel Phone Number:** ______________________________________

**Hotel Reservation Confirmation Number:** ______________________________________

What is the best transportation to get from the hotel to the conference venue?

________________________________________
Presentations Information:
SNA national leaders may present the following sessions at your state conference:

**SNA Update (20-30 minutes) at General Session**
Date: ____________________________
Start Time: ____________________________
End Time: ____________________________
Estimated Number in Audience: ____________________________
Will PowerPoint capability be available (i.e. laptop, projector, screen)? ____________________________

**Installation of Officers**
Date: ____________________________
Start Time: ____________________________
End Time: ____________________________
Estimated Number in Audience: ____________________________

Please attach a listing of all incoming board members to recognize. List should include offices and phonetic pronunciations of names.

**Break-Out Session on Educational Topic**
Date: ____________________________
Start Time: ____________________________
End Time: ____________________________
Estimated Number in Audience: ____________________________
Desired Topic*: ____________________________
Will PowerPoint capability be available (i.e. laptop, projector, screen)? ____________________________

*Please select from the approved listing of SNA break-out sessions and work directly with the National Leader to ensure you select a session which matches the National Leader’s expertise and your state association’s needs.
**Miscellaneous:**

**Recommended Attire:** ________________________________

**Conference Theme:** ________________________________

Are there any special events should the National Leader be aware of?

________________________

Please submit this form to [StateSupport@schoolnutrition.org](mailto:StateSupport@schoolnutrition.org) at least 60 days before the conference.

Please include your full state conference schedule/agenda and a list of officers to be installed (with titles and phonetic spelling of names).
SNA Sessions and Descriptions for State Conferences

As per the newly revised SNA policy, national leaders should plan to conduct the following during each state conference visit:

1. SNA Update/ Personal Leadership Journey Story at General Session (30 mins)
2. Installation of Officers (if applicable)
3. One Break-Out Session of the state association’s choice, from the list below (60 mins)

Below, you’ll find a description for the SNA Update which should be presented by the national leader as part of a General Session and descriptions for all of the available break-out sessions which the national leader may present. These descriptions can be used in your state conference program or promotional materials for the sessions.

SNA Update (INCLUDE IN GENERAL SESSION)
Hear the latest news from SNA national on professional development programs, resources to help you meet USDA Professional Standards, Child Nutrition Reauthorization, and how to take advantage of SNA member benefits to promote your program and grow professionally.

Break-Out Sessions (CHOOSE ONE)

PROFESSIONAL DEVELOPMENT

1. How SNA Can Help You Meet Professional Standards
You’ve got questions, we’ve got answers! Attend this session for an overview of USDA Professional Standards and answers to Frequently Asked Questions. Learn how SNA’s Certificate and Credentialing programs are aligned with Professional Standards and how you can meet both Professional Standards and SNA annual training requirements at once.

2. Get your SNA Certificate in School Nutrition in 3 Easy Steps
Earning your SNA Certificate in School Nutrition shows your commitment to your profession and helps you stay current on the job. SNA’s Certificate Program is based on the standards of practice in SNA’s Keys to Excellence Program and is aligned with USDA Professional Standards. Attend this session to learn how you can earn your SNA Certificate!

3. Take Your First Step towards Achieving the SNS Credential
The School Nutrition Specialist (SNS) Credential is a mark of excellence and achievement that reflects what it takes to manage school nutrition programs in today’s challenging climate. Learn about the importance of the SNS Credential, as well as eligibility requirements and content areas of the SNS Exam. Find out what exam preparation tools, resources, and tips are available to you and get started on earning your SNS!
MEMBERSHIP AND MEMBER BENEFITS

4. Take Advantage of Your SNA Membership
Are you a member of SNA or interested in joining? During this session, you will find out how to make the most of your membership! Learn about various SNA programs for members, such as the STEPS Challenge, SNA Awards Program, scholarships and grants, learning opportunities through conferences and webinars, and more.

5. Tools and Tips to Revitalize Your Local Chapter
Local chapters can provide invaluable support, training and camaraderie to SNA members in their community. If your local chapter could use a refresh, attend this session to learn and practice tried-and-true techniques to host meaningful meetings, recruit new members, and nurture volunteers at the local level.

6. Energize Your Team with STEPS!
SNA wants to make it simple for you to eat healthy, feel great, and become more active through the STEPS Challenge, SNA’s personal wellness program. The STEPS Challenge is all about small changes that can add up to make a big difference in your health. Come learn how you can start making healthier lifestyle choices for you and your staff through this program.

7. Recognize Outstanding Employees, Managers and Directors with the SNA Awards Program
Are you inspired by your school nutrition colleagues, friends, and mentors? Attend this session to learn about how you can nominate someone you admire for a SNA Award! Learn about the available awards, award rules and restrictions, and how to complete a nomination form. Also, find out tips to make your award nomination really shine, just like your nominee.

8. How to Navigate the SNA Website
The SNA website has a wealth of information, resources, and tools to help you move forward in your career, promote your school nutrition program, and help you take advantage of your SNA membership. Learn how to better navigate the SNA website to easily find what you need from SNA in the future.

PROMOTING YOUR PROGRAM/ADVOCACY

9. Promoting Your Program, Making the Most of Media Opportunities, and How SNA Can Help!
Do you want to promote your school nutrition program in a positive way? Of course! Find out what PR tools are available from SNA to help you promote your program and work with the media to create a positive image. Learn how to take advantage of ready-to-use resources for special marketing events.

10. Cafeteria Visits 101: Bringing Congress to Your School
A cafeteria site visit is a great way to meet with your Member of Congress to talk with them about the issues your program is facing and give them a firsthand look at how school nutrition programs operate. During this session, learn how to plan, schedule and host a visit with your legislators, along with helpful tips on showcasing your cafeteria and ensuring a successful event.

11. Participate in National School Breakfast Week 2017
Has your school nutrition program ever participated in National School Breakfast Week (NSBW)? Now is the time to wake up to school breakfast and get involved! Learn how to leverage NSBW as a marketing opportunity to promote your program, increase breakfast participation and energize your staff.
LEADERSHIP AND PLAN OF ACTION

12. Planning Your Leadership Year with the SNA 2015-16 Annual Plan
What are your association goals for the year ahead? Attend this session to learn the key strategies and goals for SNA’s 2015-16 Strategic Plan and how you can use the SNA national Plan as a jumping board for planning your year ahead. This session is geared towards state and local chapter leaders.
Hosting a National Leader
at Your State Conference Checklist

Request the SNA National Leader:
□ Check the *SNA Leadership Visitation Schedule* to confirm that your state is scheduled to host a SNA National Leader (SNA Board of Directors Member or Your Regional Director) this year
□ Complete & submit the *SNA National Leadership Visitation Request Form* to SNA* a minimum of 6 months prior to the conference (or as soon as possible after August 1, 2016)
□ Receive confirmation of receipt of the *State Visitation Request Form* from SNA
□ Receive name and contact information of SNA National Leader your state will be hosting from SNA
□ Call or email the SNA National Leader to welcome them, thank them for attending the conference, and coordinate logistics/answer questions they may have

Coordinate Logistics for the Event:
□ Book hotel reservations for SNA National Leader
□ Coordinate travel plans for the SNA National Leader to/from the airport (if applicable)
□ Register SNA National Leader for the state conference (*SNA should not be charged a registration fee.*)
□ Create a name-badge for the SNA National Leader to ensure they may go to all events at the state conference
□ Ensure you have the necessary technology (such as laptop computer, projector, and projection screen) ready for SNA National Leader’s sessions
□ Provide logistical information to SNA Headquarters by completing and submitting the *SNA National Leadership Logistics Form* to SNA at least 60 days before the conference*
□ Provide SNA National Leader with the list of incoming and outgoing state board members to be installed (if applicable)*
□ Provide SNA National Leader with the full state conference schedule/agenda*
□ Choose an individual to welcome the SNA National Leader at the conference
□ Ensure you have swapped cell phone numbers with the SNA National Leader and know their flight information/ schedule

Follow-Up:
□ Call or email the SNA National Leader to thank them for the visit
□ Provide feedback to SNA headquarters about the visit via the online evaluation

*Please submit forms to SNA headquarters via email at StateSupport@schoolnutrition.org.*
Chapter 2:
Board Management & Leadership
Recommended State Association Activities

As a SNA state association, you represent and serve your members while carrying out a stated mission, as well as strategic and annual plans to address strategic issues in your state. In addition, you work with the SNA at the national level to advance school nutrition programs and support the national mission and annual plan.

State association activities should include:

- Hosting meetings for your members, such as an annual state conference, industry conference, equipment shows, etc.
- Advocating for school nutrition in your state
- Providing educational opportunities for your members in the state
- Connecting members to SNA benefits
- Guiding and supporting local chapters and state members through:
  - Leadership training
  - Membership recruitment and retention
  - Professional development programs
  - Member services
  - Public policy information
  - Chapter program ideas
  - Governing rules
  - Fundraising and updates
  - Encouraging participation in national and state awards and recognition programs and meetings and conferences
- For more ideas, check page 61 on Membership Engagement

The state association executive board serves as the governing body for your state association and the voice of your members. The leaders of your state association select your association’s representatives to the SNA Delegate Assembly (formerly House of Delegates) that meets once a year at SNA’s Annual National Conference in July. The Delegate Assembly has the ultimate authority to amend the SNA bylaws and influence school nutrition program policy through visioning, discussions and resolutions.

A Special Note about Membership...

Membership recruitment and engagement isn’t just the job of the membership chair alone—it should be a full board and a full association effort!

Remind your board members to talk up the value and benefits of being a part of SNA consistently, constantly, and with enthusiasm to recruit members. Brainstorm ways together to get more SNA members involved on a regular basis. Membership is a team effort!
Sample Job Descriptions

Below are sample job descriptions for potential positions within the state association. Not all state associations must include each position, and in some cases, certain positions may be combined. These examples provided should be used as guidelines, and the descriptions should be adjusted to fit the needs of your association.

For each board position, you should develop eligibility criteria. Examples can include, but should not be limited to:

- Be a SNA member in good standing.
- Have demonstrated leadership abilities, e.g., served on state or national committees.
- Demonstrate a career commitment to school nutrition.
- Be SNA-certified and/or SNS-credentialed.

Officers are elected annually to serve a one-year term. Board members should have a clear understanding of their expectations during their term of office. This is usually conducted during a Board orientation. It is recommended that the state association develop and maintain policies and procedures, which outline guidelines for:

- Attendance at Executive Board meetings
- Board meeting procedures and policies
- Board travel
- Pre-Board planning preparation
- Reporting procedures
- Elections and ballots
- Conducting business

In addition, your state association’s Policy and Procedures should include a formal policy regarding the removal of an officer or termination of hired staff.
**President’s Sample Job Description**

The President serves as the chief elected officer of the state association. The President presides over meetings of the Executive Board, exercises general administrative control of the overall operation of the association and provides the necessary leadership for implementing the vision and the mission of both the state and national associations. State Presidents also act as the main liaisons to SNA headquarters for the state association.

**General Responsibilities:**

The President:

- Serves as the Chief Elected Officer of the association following installation
- Represents the state association:
  - At all nationally sponsored meetings where representation from a state leader is expected, and/or as it is voted upon by the Executive Board,
  - As a voting member of SNA’s Delegate Assembly at the Annual National Conference,
  - As a point of contact between the state and the SNA Regional Director and between the state and national Association; e.g. submitting requested information, applying for award(s), etc.
- Presides at meetings of the Executive Board. As such, the President
  - Sets the date, place and time of Board meetings, unless otherwise noted in the state bylaws,
  - Prepares the agenda for Board meetings,
  - Assures that all necessary documents are sent to the members of the Board at least two weeks prior to the meeting,
  - Conducts the meeting according to “Robert’s Rules of Order, Newly Revised,”
  - Ensures that all motions, recommendations and resolutions of the Executive Board are implemented.
- Advises the national Association of all newly elected officers within 15 days after the election.
- Develops the state’s Annual Plan during SNA’s National Leadership Conference.
- Assures execution of the state’s Annual Plan as it relates to the national Association’s Annual Plan.
- Participates actively in developing the association budget.
- Attends and participates in local chapter meetings, as requested by the chapters.
- Prepares written reports of all national meetings or conferences attended and provides them to the Executive Board and for the association publication.
- Works with other elected officers in selecting committee chairs and committee members.
- Passes along all pertinent information to the incoming president, and prepares and presents a report of the year’s events for the Delegate Assembly.
**President-Elect’s Sample Job Description**

The President-Elect performs all duties and functions of the President during the President’s absence, inability to act or whenever necessary. The President-Elect becomes President when new officers are installed or in the event of the President’s resignation or removal from office. In many states, the President-Elect acts as the annual conference planning chair, along with the general responsibilities listed below.

**General Responsibilities:**

The President-Elect:

- **Becomes familiar with the:**
  - Duties of the President,
  - Responsibilities of the Executive Board, including all committees,
  - State and National Bylaws,
  - State Association’s Policy and Procedures Manual,
  - “Robert’s Rules of Order, Newly Revised.”

- **Prepares to assume the duties of the President by:**
  - Taking over the role of President in the President’s absence or inability to act,
  - Performing duties as assigned by the President,
  - Reviewing correspondence as referred by the President,
  - Considering members for committee assignments for the following year to be recommended and approved by the Executive Board.

- **Serves as a voting member of the SNA Delegate Assembly at Annual National Conference.**

- **Serves as a member of committees as assigned by President.**

- **Prepares all written reports as necessary and submits information and articles to the association publication to keep membership informed.**

- **Attends chapter meetings in the President’s absence or as requested and, upon conclusion of the term of office, shall:***
  - Prepare and present a report to the Delegate Assembly.
  - Pass on to the incoming President-Elect all accumulated and pertinent documents and information and continues to serve as a resource to that office.
**Vice President’s Sample Job Description**

The Vice President works with the chapters promoting the state’s Annual Plan and Strategic Plan, providing a liaison between the chapter affiliates and the Executive Board. The Vice President succeeds to the office of the President-Elect when the new officers are installed during the Annual State Conference or in the event of the President-Elect’s resignation or removal from office.

**General Responsibilities:**
The Vice President:
- Performs the duties of the President-Elect in the President-Elect’s absence.
- Acts as a liaison between chapter affiliates and serves as their voice to the Executive Board.
- Serves the chapter affiliates as needed and requested.
- Promotes the association’s Annual Plan, as well as membership and professional growth opportunities.
- Serves on committees as outlined in the bylaws or as appointed by the President or President-Elect.
- Succeeds to the office of President-Elect at the installation of officers.
Treasurer’s Sample Job Description

The Treasurer has oversight of the financial operations of the association and is responsible, along with the budget committee, for preparing the budget for approval by the Executive Board. The Treasurer serves as Chair of the Finance Committee and also oversees any financial tasks delegated to other positions within the association. (Please note that many state associations combine the roles of Treasurer and Secretary.)

General Responsibilities:
The Treasurer:
• Provides a detailed written report of the financial standing of the association at each Executive Board meeting.
• Files all Federal and State income tax forms by the published deadlines.
• Prepares and submits the proper tax records at the end of the calendar year.
• Maintains a copy of the Articles of Incorporation.
• Serves on committees as assigned or appointed by the President or President-Elect.
• Receives and reviews monthly rebates reports from SNA national for state dues and other items
• Must be bonded.

In addition, the Treasurer ensures that:
– Accurate records are kept of all receipts, disbursements, cash and draft, in budgeted accounts in the official records belonging to the association,
– Approved expenses are paid promptly,
– Checks over $500 are co-signed by the President or President-Elect.
– Proper funds are allocated to help defray the costs for winners of National awards to travel to conferences.
– The President and President-Elect are bonded for the same sum as the Treasurer.
– Proper funds are budgeted for registration, attendance and travel for appointed leaders to attend national Association’s functions.

Upon conclusion of the term in office, the Treasurer:
• Provides a year-in-review of all financial activity to be presented at the Executive Board meeting.
• Secures the services of an independent auditor to ensure the accuracy of the books being turned over.
• Meets with the incoming treasurer to discuss and review pertinent policies and procedures.


**Secretary’s Sample Job Description**

The Secretary, at the request of the President, is responsible for all general correspondence and shall ensure that the minutes of all meetings are recorded and distributed to staff, paid or volunteer, within one week of the Executive Board meeting. This position is also responsible for providing up-to-date and accurate information to be included in the association publication. The Secretary may be responsible for the publication if assigned by the President or otherwise specified in the bylaws. *(Please note that many state associations combine the roles of Treasurer and Secretary.)*

**General Responsibilities:**

The Secretary:

- Maintains accurate records of all meetings of the Executive Board and the Delegate Assembly, if one exists, including attendance, date, time and location. All records remain the property of the association.
- Sends minutes in a timely fashion to the staff, paid or volunteer, for dissemination.
- Keeps accurate accounts of all action to be taken (motions passed or defeated).
- Assists in the execution of the Annual Plan.
- Maintains a record of all meetings of the association and Executive Board for historical purposes.
- Attends chapter meetings or installation services as requested by the Vice-President. Serves on committees as assigned by the President and the President-Elect and, upon completion of the term of office, serves as a resource to the incoming Secretary, providing information on policies and procedures.
- Keeps historical record of all actions approved by State Executive Board over the past ten-year period.
**Membership Chair’s Sample Job Description**

- Develop and implement a plan to encourage non-members to join
  - Promote membership at all state association meetings/conferences/trainings
  - Reach out to non-member school nutrition directors in your state and explain the benefits for them and their staff
  - Promote [School District-Owned Membership (SDM)](#) as an option

- Develop a plan to invite new members to attend state association meetings/conferences/trainings

- Pull monthly rosters from [My Account](#) on [www.schoolnutrition.org](http://www.schoolnutrition.org) to stay abreast of changes in the membership
  - Welcome new members to SNA with an email or phone call (by you, someone on your committee, a local chapter member)
  - Remind members who are in grace or expired to renew their membership with an email or phone call (by you, someone on your committee, a local chapter member)
  - Interview individuals who choose not to renew to find out why they have left the association

- At each state board meeting
  - Report on the membership status
  - Inform board members about SNA membership campaigns
  - Encourage board members to help recruit members

- Implement any state or national membership campaigns. Annual SNA membership campaigns include:
  - [Back to School Membership Drive](#) for state affiliates
  - [Annual Membership Campaign](#) for members

- Encourage members to participate in SNA programs (such as the [STEPS Challenge](#), [Star Club](#), and [SNA Awards Program](#)) to take advantage of their membership benefits
  - Request membership brochures, flyers and Star Club prizes from SNA to use at your state conference
  - Hold a session at your state conference about SNA programs/membership benefits

- Provide [support and guidance](#) to local chapters in membership recruitment and retention efforts
**Paid Staff Position’s Sample Job Description**

The staff position, whether performed by volunteer or paid staff, shall provide overall administration of the association’s daily operations, including membership and certification recruitment and retention efforts as determined by the Executive Board.

Please note that the responsibilities will vary based on the job title, expectations, salary, and contract of the paid staff position. An executive secretary should have different expectations than an executive director.

It is also important to note that while paid staff provide valuable support to the Executive Board, they should not be expected to “do it all,” especially if your paid staff contingent consists of one individuals. Committee chairs and members and the Executive Board should continue to play active roles in the work of the association.

**General Responsibilities:**
The Staff Position:

- Works with the Executive Board to maintain accurate records of meetings, correspondence and financial activities.
- Maintains member and certification data.
- Processes conference registrations, industry members included.
- Assists and provides support for the development of the association’s newsletter and communications with the national Association.
- Responds to phone calls and e-mails directed to the association.
- Collects, responds and disseminates mail directed to the association.
- Maintains regular contact with national Association in regard to all pertinent member benefits and a variety of other information as requested by the Executive Board.
Board Orientation

To ensure the smooth transition of leadership on the Executive Board, one of the most effective transition tools is the Board Orientation. Outgoing Board members hold a wealth of knowledge that should be passed along to the incoming Board. In addition, the orientation process will provide the current Board with a clear definition on expectations of their leadership role and a reminder of their fiduciary responsibility to the association.

Board Orientation should not just be a one-time meeting, but an ongoing learning process for your Board. Below is a description of the three parts of the ongoing board orientation you should strive to provide your Board.

Part 1: Orientation Meeting
Arrange a combined meeting or event for all current and incoming Board members. During the meeting the outgoing Board members can mentor the incoming members who will take over their positions. Highlights to cover during the meeting include:

- Association governance structure
- Fiduciary responsibilities
  - Duty of Care
  - Duty of Loyalty
  - Duty of Obedience
- Job descriptions and expectations
- How to preparing for a Board meeting
- Board meeting format
- Engagement expectations
- Key board policies (see Chapter 4 for more detailed information and samples)
  - Confidentiality
  - Conflict of Interest
  - Whistleblower
- Travel policy (including reimbursements process)
- Dress guidelines

Part 2: First Board Meeting
The first board meeting is a great learning opportunity for your new board members, and it is another chance to set expectations for the year ahead. During the first board meeting, you should:

- Review the four part agenda
- Provide an overview of what mega issue discussions are and how they’ll be conducted
- Teach your members how to read a financial statement
- Discuss the engagement expectations you have for all of your board members during Board meetings
- Reiterate the importance of confidentiality
Part 3: Training throughout the Term
Throughout the year, continue to look for opportunities to “train” your board and help them reach their leadership potential. Here are a few ideas:

- Email your Board articles on board management
- Give each board member a copy of *The Board Book* by William G. Bowen
- Share association best practices for boards
- Attend SNA leadership and staff training
- Attend SNA conferences, including National Leadership Conference
Conducting an Executive Board Meeting

Effective management of your association requires organized and efficient Board meetings.

Scheduling Your Board Meetings
Many associations conduct quarterly Board meetings to review the financial status, discuss the progress of activities and plan any major meetings and conferences that may be pending. In short, Executive Boards meet to do business, so it is important that meetings are run well. It is helpful to hold meetings the same time every year. For instance, SNA’s Executive Board meets three times each year: in October, prior to National Committee Days; in April, prior to the National Leadership Conference; and in July, prior to the Annual National Conference.

One of the most important aspects of the meeting is to find a time that is convenient for all (or most) Board members to attend. For those members who cannot attend, provide them with a meeting summary within a specified amount of time from the conclusion of the meeting.

Running Your Board Meetings
Depending on the group, some leaders may choose to follow a less-structured format for meetings. It is very important, however—no matter how informal the meeting structure—that the meeting is conducted by following “Robert’s Rules of Order, Newly Revised.” Remember to maintain a time schedule. Board members make a commitment of time to attend the meetings, and it is important to adhere to those guidelines. This includes beginning and concluding your meeting on time. On the next page is a sample meeting agenda that may be used to conduct the meeting. Make adjustments as necessary to accommodate the needs of the group.
Sample Four Part
Board of Directors Meeting Agenda

[DATE]

Call to Order
- Thought of the Day
- Roll Call/Attendance/Introduction of Guests
- Adoption of the Agenda
  o Consent Agenda could include approval of minutes from previous meeting and action items. (If discussion is requested for an action item, the item must be removed from the Consent Agenda.)
- Confidentiality Proceedings Statement
- Antitrust Statement

1. Discussion of Strategic Issues
   - Mega-Issue Discussion(s)

2. Review & Adjustment of Strategic Plan

3. Policy Determination
   - Public
     o Advocacy
     o Policy Issue Responses
     o Public Relations
   - Operational
     o Governance
     o Proposed Bylaw Amendments

4. Routine Board Business
   - Financial Report
   - Staffing Report
   - Executive Committee Minutes
   - Consent Agenda
     o Meeting Minutes
     o Action Items
   - Evaluation of Board Meeting

Executive Session
Adjourn
Sample Board of Directors Meeting Minutes

Minutes
Board of Directors Meeting
[DATE]

Members Present
[List Board Directors Here]

Ex Officio Member
[Name]

Regional Directors
[List Regional Directors Here]

Members Not Present
[List Names]

Program Chairs
[List Program Chairs Here]

Special Guests
[List Names]

Industry Representative
[Name]

Staff Present
[List Names]

Next Meeting: [Date], [Location]

Call to Order: President [Name] called the meeting to order at [Time] on [Day of Week], [Date], reviewing the confidentiality proceedings statement and the anti-trust policy statement. [Name] gave the Thought for the Day. Secretary/Treasurer [Name] announced there was a quorum.

Actions Approved:

- [List any actions approved by the board in bulleted format. Include any consent agenda action. Do not include motions, firsts and seconds.]

Discussion of Strategic (Mega) Issues

{Provide only a brief synopsis of each discussion}

[Topic]
President [Name] reported on/ gave status of [Synopsis]

[Topic]
[Committee] Committee Chair [Name] reported on [Synopsis]

Review and Adjustment of Strategy

President [Name] reported on/ gave status of [Synopsis]

Policy Determination

[Topic]
President [Name] reported on/ gave status of [Synopsis]
Routine Board Business
Financial Report
Secretary/Treasurer [NAME] reported on [TOPIC] finances, as of [DATE].

[TOPIC]
President [NAME] reported on/ gave status of [SYNOPSIS]

Evaluation of Board Meeting
President [NAME] asked the Board members to complete and turn in the Board meeting evaluation.

Adjournment:
There being no further business, the meeting was adjourned on [DAY OF WEEK], [DATE] at [TIME].
Rules of Parliamentary Procedure

The book, Robert’s Rules of Order, is the recognized authority on Parliamentary Procedure for the Association. It should be used as a guide for conducting meetings in an orderly fashion. Parliamentary procedure is based on common sense and courtesy. It is intended to transact business efficiently, protect the rights of individuals, and preserve a spirit of harmony.

The rules of parliamentary law state:

- Only one person speaks at a time.
- Each member has equal rights.
- Each item presented is entitled to discussion time.
- The decisions of the majority are upheld. However, the right of the minority to offer dissenting opinions and differing views are respected.

Progress of a Motion

1. Presenting the motion (by any member of the assembly).
2. Seconding the motion (by any other member of the assembly).
3. Restating the motion (by the chairperson immediately following the second).
4. Discussing the motion (except when the motion is not debatable).*
5. Voting on the motion (both affirmative and negative votes must be taken).
6. Announcing the results (by the chairman immediately following the vote).

*Amendments may be made to a motion during discussion, if the amendment does not substantially change the original motion. If the amendment is a substantial change to the original motion, the motion must be voted on first, before the change can be presented.

To purchase your copy of Robert’s Rules of Order, check any book retailer or Amazon.com.
Positive Leadership

“Leaders are pioneers. They are people who venture into unexplored territory. They guide us to new and often unfamiliar destinations. People who take the lead are the foot soldiers in the campaigns for change...The unique reason for having leaders – their differentiating function – is to move us forward. Leaders get us going someplace.”

James M. Kouzes and Barry S. Posner

Ultimately, your role as a leader in the state association is to improve the lives of and address the issues current to the association’s members, constantly working to propel the association to the next level. Leaders should work hard to help the association achieve its goals. In this effort, the state leadership should be a source of stability, continuity and momentum. In addition, leaders should be flexible. Positive leaders care about results, empower people, celebrate successes, build consensus and embody a host of other positive leadership characteristics when dealing with the “human” side of leadership. In the business side of leadership, the leader must solve problems and set policies, standards and goals.

Leading is different from managing. As a leader, your primary focus is forward-thinking, strategic planning, motivation and PEOPLE. Managers are primarily focused on the day-to-day operations – the hard facts and the bottom-line. Work toward building a blend between both sides. If you can create a happy medium between the two, you will have laid the groundwork to positive leadership. Establish your legacy for the next group of leaders to follow.
**Knowledge-Based Decision Making**

In a Knowledge-Based Association, who makes the decision is far less important than the quality of information and insight on which the decision is made. Knowledge-based decision making requires that board members come prepared to the meetings with factual background information to consider.

**What is Knowledge-Based Decision Making?**

It is a way of considering discussion topics and making decisions which:

- Is based on strategic thinking and the pursuit of the right questions
- Ensures sufficient thought and discussion to see the realm of possibilities
- Makes the best-possible decision, based on knowledge we have

**Focus of Executive Boards using Knowledge-Based Decision Making**

In a Knowledge-Based Association, board work is focused on:

- Direction setting and strategic planning
- Policy making and approval
- Defining desired outcomes
- Evaluation and assessment
- Insuring the good name of the association

**Impact of Knowledge-Based Decision Making on Boards**

By using knowledge-based decision making, your board should become:

- More responsive and quicker to react
- More rational/open and less political
- More nimble/flexible
- More concerned about outcomes

**Changes You Should Experience**

*BEFORE*, your board members may say things like:

- I believe...
- Carol says...
- We always do it this way...

*AFTER*, you board members may say things like:

- Based on...
- Because attendance dropped for five years...
- Our member surveys show that members prefer...

**Essential Elements**

Essential elements of knowledge-based decision making include:

- Dialogue before deliberation
- Planning and thinking strategically
• Well-prepared directors (provide background information well in advance of the Board meeting)
• Trust and respect

Questions for Knowledge-Based Decision Making
The following questions should be used in your mega-issue discussions to ensure decisions are made based on as much information as possible:

• What do we know about members, prospective members and customers’ needs, wants, and preferences relevant to this decision?
• What do we know about the capacity and strategic position of our organization relevant to decision?
• What do we know about current realities and dynamics of our marketplace?
  o Positioning?
  o Resources?
• What are the ethical implications, if any?

Percentage of Time Spent
The majority of time for the Board meeting should be spent on dialogue—discussing important issue(s) for the association in an open way; followed by deliberation. Below is a list of what should take the most time at your meeting (dialogue), down to what should take the least time (other reports):

• Dialogue (most)
• Deliberation and decision
• Planning/future
• Official business reports
• Other reports (least)

Board Packet/Information
Board packets should include the following items to prepare for a successful meeting:

• Agenda
• Action items
• Committee reports
• Business report
• Background information for discussions
The Leadership Ladder

A great way to think about leadership development is to imagine that it is a ladder that members can choose to go up (and down!). Here are a few important reminders about the leadership ladder:

- The ladder is fluid. Members can move up and down the ladder, as their own personal and professional schedules and desires change.
- The ladder is centered on what the member wants.
- Most individuals need a guide or mentor to move from one rung to the next.
- Members at all rungs should be valued and thanked.
- Members can move at different rates from one rung to the next. There is no right or wrong timeline.

Involving Members on Committees

A great way to engage members to lead is through your state committees. Committees give members a leading role and give you a chance to bring new members to become active in the state association.

Most members are very busy with their job requirements and other personal commitments, so they may limit the amount of time they are willing to commit to association leadership positions such as serving on a committee. Here are some tips for overcoming this concern and having successful committees.
• Recognize up front that, just like you, your members are busy. Committee meetings need to be well organized and structured. Committee chairs need to run committee meetings efficiently.

• Spread out the responsibilities among the members. The more people take on responsibilities, the easier it is to accomplish tasks and avoid burnout. Each committee member should volunteer as much time as they are willing to commit to a task.

• Create incentive programs for involvement in association leadership positions. Recognize not only those who contribute the most, but those who are contributing for the first time as well. Try not to overlook the members who have little time to contribute but make an effort to become involved anyway.

• Assign members by their interests to those respective committees. If a member has a particular interest in social events, have them work on the Entertainment as a part of the State Conference Planning Committee. Likewise, if you have a member who is an active recruiter, assign them to the Membership Committee.

• Survey members as to which committees they would be willing to help. Have committee chairs contact them individually to ask for assistance.

Ask members how much time they are able to commit to the association. For those members with little available time, assign them small tasks that take small amounts of time to accomplish.

**Practical Tips to Move Members to Lead**

**Making the Leadership Ask**

Just like asking someone to be a member, it is equally important to find potential leaders within the organization, talk to them about the benefits of becoming a leader in your state association and SNA, and ask them to participate in a leading role. Here are some tips to moving a member to become a leader in your state association:

• When asking someone to engage with your state association as a leader, you should stay positive and share your personal experience about how becoming a leader in SNA has helped you grow personally and professionally.

• Start off by asking individuals to engage with SNA by committing to smaller, easier tasks and then moving them to have a bigger role. Look out for active chapter members and leaders, as they could potentially become state association leaders.

• Always say thank you and recognize all contributions—big and small.
Planning Your Leadership Year and Beyond

Strategic Planning Overview
Strategic planning is defined as a consensus-seeking process through which organizations define their purpose, describe a future state they want to achieve, identify barriers and opportunities in reaching that destination, and decide how they intend to get there. An association's strategic plan is one of the most important and useful tools it will use to aid in its progression as an organization. Before a “Plan” is formulated, the planning has to be done.

When you begin the strategic planning process, think of it as a fluid, moving event. Enter the process with an open mind, and be committed to the outcome. Strategic planning includes the development of mission and vision statements, identification of key issues within the association, setting goals and developing strategies to achieve those goals.

In many cases, associations hire an outside consultant to facilitate their strategic planning. In some cases, SNA staff has assisted state associations with their strategic planning by facilitating the planning process. If your state needs assistance, contact the SNA Headquarters Office at (800) 877-8822.

2016-2017 Calendar of Important Dates

August 2016
• August 22-24: State Association Executives Conference in National Harbor, MD

September 2016
• September 1: Back to School Membership Drive Begins
• September 30: State Delegate Information Sheet due to SNA headquarters

October 2016
• October 10-14: National School Lunch Week (Theme: School Lunch: Show Your Spirit!)

November 2016
• November 30: Back to School Membership Drive Ends

December 2016
• December 15: Plan of Action Form due to SNA headquarters by the State President

January 2017
• January 20-24: School Nutrition Industry Conference in Orlando, FL
• Promote SNA awards and SNF scholarships
February 2017

• Promote SNA awards and SNF scholarships

March 2017

• March 1: SNA Awards nomination forms are due to the state association
• March 1: Spring Membership Drive begins
• March 6-10: National School Breakfast Week *(Theme: Take the School Breakfast Challenge)*
• March 15: State SNA Award Winners are due to SNA headquarters from State Presidents
• Promote SNF scholarships

April 2017

• April 2-4: Legislative Action Conference in Washington, DC
  o State President and Presidents Elect Meeting
• Online applications for SNF scholarships due

May 2017

• May 4-6: National Leadership Conference (NLC) in Baltimore, MD
• May 4-6: Future Leaders Program, in conjunction with NLC in Baltimore, MD
• May 5: School Lunch Hero Day
• May 31: Year-End Report due to SNA headquarters by State Presidents
• May 31: Spring Membership Drive ends
• May 31: SNA Membership Year ends

June 2017

July 2017

• July 9-12: Annual National Conference in Atlanta, Georgia
  o Sunday, July 9: State Awards Ceremony
• July 31: SNA Leadership Year ends
Chapter 3: Membership
SNA Membership Processes and Procedures

SNA national plays a critical role in membership by processing SNA membership applications, providing state affiliates with up-to-date membership rosters, promoting SNA membership and member benefits and more. Below are the specifics about SNA national’s membership processes and procedures. For membership questions, please contact the SNA Membership Manager at (301) 686-3119 or membership@schoolnutrition.org.

Direct to National Processing Program

The Direct to National Processing Program was established in 1997 to offer members and state affiliates a streamlined membership processing program. Members send their membership renewals directly to SNA in care of a bank lockbox. Payments are processed and then forwarded onto SNA. All states are required to participate in the Direct to National program, as a result of a vote by the SNA House of Delegates. Below are the three major benefits of the Direct to National Processing Program:

1. **Results in memberships being processed quickly.** Direct to National program memberships are processed within two to four weeks of when members send in their applications and dues. By submitting applications directly to national for processing (as opposed to sending it to the state), the timespan between when members submit their membership dues and when they receive their membership card and magazine is greatly reduced.

2. **Enables states’ staff the time to do other things.** The time that was usually dedicated to processing memberships is now available to do other activities to further your state association’s goals. It allows their staff to concentrate on other projects to help generate non-dues revenue, enhance state publications, or improve the state conference. Not only do they not have the applications to process, it also cuts down on the number of phone calls and follow-up.

3. **Allows states to use volunteers in other ways to benefit the association.** More and more today, it is becoming harder to get people to volunteer. Processing memberships takes a lot of time, from processing applications to reconciling the applications with checks received and contacting members who didn’t send in the correct dues amount. For states that used volunteers to process memberships, it takes away the problem of finding someone willing to do it. Now state volunteers can spend time helping further child nutrition legislative efforts, enhancing the image of child nutrition professionals and promoting public awareness about programs.

How it works:
- Membership applications, customized with state dues information, are sent to members with instructions to mail their application, with state and national dues and the $2.00 processing fee, directly to the SNA lockbox address, located in Baltimore, Maryland.
• Dues payments received in the mail from new and current members are processed at the bank-processing center within a day from when they are received. After processing, the applications are forwarded to SNA along with a payment report. SNA is informed of the exact payment received for each application.

• Once received at SNA, applications are reviewed to verify that national dues, state dues, and the $2.00 processing fee have been collected. If members do not pay the full amount, an invoice is sent to the individual highlighting the amount received, the amount owed and the amount due. In the case of overpayments, members are sent a refund with a short letter indicating the overpayment. If the member’s payment is equal to or less than $10.00, that amount will be credited to the member’s account, which can be used for any SNA payment, other than an Emporium purchase.

• Member contact information and dues payments are entered into the database as part of the month’s normal data entry.

• At the end of the processing month, SNA forwards a check to the participating state affiliate for state dues collected. In addition, this check is accompanied by a state dues rebate report, listing the names of all members for whom dues were collected.*
  o **Monthly State Rebates and Reports:** State rebate reports provide state associations with information about the memberships processed within the month by SNA national and the state dues collected by SNA national on behalf of the state association. State rebate reports are sent via mail or email each month, to the individual designated by the state association. The state association also receives the state dues collected on a monthly basis via a check or direct deposit (Automated Clearing House/ACH).
  o Receiving the state rebates via direct deposit is highly recommended for all state associations as it is a faster, more convenient option and does not rely on an individual to deposit the checks into the association’s bank account. To sign up for this option, please contact the State Affiliate Relations Manager at (301) 686-3074 or StateSupport@schoolnutrition.org.

• States can check My Account at any to time to print out their membership rosters.

• On a monthly basis, it is recommended that states check My Account for membership reports of new, reinstated, and lapsed members.

• States’ membership processors, membership chairs, state association executives, state presidents and state president-elects have access to their membership rosters through My Account on the SNA website.

For more information on SNA’s Direct to National Processing Program, contact the SNA Membership Manager, at (800) 877-8822, ext. 119 or membership@schoolnutrition.org.
Renewal Notices
SNA mails renewal notices to non-School District Owned Members (non-SDM) via first-class mail, along with an email reminder two months prior to when they are due to renew. National and state dues are printed on all renewal forms. The dues amount printed on the form is based on the member type that the member paid dues on from the previous year. All renewal notices are printed, processed and mailed from SNA’s national office.

In addition to the first renewal notice, SNA sends a second renewal notice approximately one month after the member was due to renew. This second notice reminds the lapsed member that they have not yet renewed their membership and the benefits they will miss out on if they do not renew.

**Approximately 3,000 first and second renewal notices are mailed each month to non-SDM members.**

The renewal notice is slightly different than the application used for new members. SNA only needs to update address and contact information from members who have moved, whereas the Association needs all information for new members.

Renewals for School District Owned Memberships (SDM) are sent via email to the designated SDM administrator (or main contact) at most twice a year, depending on the member’s expiration dates. Administrators may choose to pay for all the SDMs at one time, regardless of expiration dates. If requested, SNA will also work with the administrator to align expiration dates so they all renew at the same time.

Membership Cards
All new SNA members are mailed a membership card within two weeks of receipt of payment. Renewing members are able to log into My Account to view/print an electronic copy of their membership card. Electronic membership cards include the membership expiration date as well as the SNA certificate level and expiration date (if applicable). Electronic membership cards are synced with SNA’s database and updated in real-time as a membership or certificate is renewed. Replacement cards are printed and mailed to the members who call in and request a new card. However, SNA Headquarters recommends that members who have lost their cards use My Account to reprint their cards from their computers.
Pulling Membership Reports on My Account

All applications received by the last day of the month are included in the current month’s processing so SNA can close out and run timely financial reports. The only exceptions to this are applications received in May, the end of the membership year. For May, all applications received that are postmarked by May 31 are included in the May processing and in year-end membership numbers.

Once all membership batches are processed and all exception reports are run to detect data errors, membership statistics and rosters can be run for the previous month. State leaders are notified each month via email when month-end rosters may be accessed using My Account at www.schoolnutrition.org. Rosters are no longer emailed directly to state leaders, as My Account updates regularly and can always be accessed to get up-to-date information on membership, certificate, and credentialing numbers for your state.

Below is a screen shot of all of the state membership rosters you can access. This screen shot was taken from My Account, as the website was being redesigned during the printing of this handbook. The look might change on the new website, but the content will remain the same.

For a complete guide to using My Account, go to www.schoolnutrition.org/StateSupport and refer to the membership resources section.
Membership, Certificate, and Credentialing Statistical Reports

Membership report queries from SNA’s member database produce statistics for the total number of members by state, member type and region, as well as the number of new, renewing, and expiring members by state, and member type. SNA staff use the raw figures to produce the monthly membership statistical report. This monthly report shows how states are doing compared to last May (end of membership year) as well as compared to the membership goal for the year. The annual membership goal for each state is also included in the report to help states track progress.

Also included in this report are monthly updates about the number of individuals who have a SNA certificate and SNS-credent for each state and region. Comparisons to last May (end of membership year) as well as compared to the goal for the year are also included for certificate and credentialing numbers.

Reports are sent to the SNA Executive Board, state presidents, state presidents-elect, state vice presidents, state association executives, state membership chairs and processors, state certificate/education chairs and processors, and SNA’s Membership Committee. A brief analysis is also included.

To the right is a sample of the first page of the report, showing the membership overview and how the current membership compares with overall membership trends.
Membership Marketing Programs

In an effort to continually increase membership, SNA has several membership recruitment programs. Recruiting members is an ongoing process for all associations. With an average overall retention rate for associations of 81%, recruiting members is an essential activity that never ends if one wants to, even at a minimum, retain its current number of members, let alone grow the association. Listed below are membership tools that SNA provides.

1. Online Membership Resources
SNA has a rich library of online tools to help state associations recruit members and connect them to member benefits (such as the Star Club and SNA Awards Program) including presentations, customizable brochures, flyers, website banner ads, ideas to increase membership, membership videos and much more. Find all of the state resources at www.schoolnutrition.org/StateSupport.

2. Membership Brochures and Flyers
Brochures promoting SNA membership and the SNA Certificate Program to targeted audiences, as well as flyers on specific SNA programs (such as the SNA Star Club, Awards Program, SNS Credentialing, etc.) can be ordered from SNA for use at state conferences, in mailings, at local chapter meetings, and other recruitment and engagement activities.

Along with promotional materials, state affiliates may also order the prizes for their Star Club members through this process. (Star Club prizes will otherwise not be disseminated to the members.)

To find a complete list of items you can order and to download order forms, go to www.schoolnutrition.org/StateSupport in the state conferences section.

3. Annual Membership Campaign
SNA conducts an annual membership campaign to increase membership. It runs from June 1 through May 31, which is SNA’s membership year. To make the campaign fun and encourage participation, there are prizes like future ANC registrations. The campaign works by encouraging members to participate and recruit new members for the association. For each new member they recruit, their name is entered in the prize drawing, which is drawn at the end of the membership year. For a member to get credit for recruiting new members, their name must appear on the new member’s membership application in the “Who referred you to SNA?” line. This information is then entered in SNA’s database during membership processing. SNA produces an annual brochure for the membership campaign, which is sent to all states for distribution.
4. Other Membership Drives
Each school year, SNA holds a Back to School, Spring and School Lunch Hero Day membership drive. While the annual membership campaign is for the entire membership year, the other drives provide dedicated timeframes to help focus on recruiting new members. Traditionally, the Back to School drive is from September 1 to November 30, the Spring drive is from March 1 to May 31 and the School Lunch Hero Day drive is in May. States are automatically entered to participate in the Back to School and Spring drives. Recruitment materials (which are always available to state associations for order) include drive brochures, membership applications, membership brochures, recruiting tips, annual membership campaign brochures, rosters of expired members and STAR Club brochures.

If your state association is hosting your own membership drive, please notify SNA at StateSupport@schoolnutrition.org. This will help SNA headquarters process your membership applications and support you in your recruiting efforts.

5. Star Club
SNA is the strong organization it is today because of members who recognize the value of SNA membership and dedicate themselves to the association and its mission. The best way an association obtains new members is by current members recruiting their colleagues. The Star Club is SNA’s way of recognizing and thanking members who recruit and retain SNA members.

Every time a member’s name is listed on a new member application as the refferer (section 10 of application), that person receives one credit – plus an additional credit is earned for every year that member renews. Credits do not expire and once three (3) credits are achieved, an individual becomes a Star Club member for as long as they are an active SNA National member.

Star Club members are recognized throughout the year, including special recognition at the Annual National Conference (ANC). In addition, a gift of appreciation is awarded for each time a member reaches the next Star Club level. The Star Club levels are as follows:

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>STAR CLUB CREDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Star Club Member</td>
<td>3 credits</td>
</tr>
<tr>
<td>Bronze Star</td>
<td>10 credits</td>
</tr>
<tr>
<td>Silver Star</td>
<td>50 credits</td>
</tr>
<tr>
<td>Gold Star</td>
<td>100 credits</td>
</tr>
<tr>
<td>Platinum Star</td>
<td>150 credits</td>
</tr>
<tr>
<td>Diamond Star</td>
<td>250 credits</td>
</tr>
</tbody>
</table>

SNA has developed a Star Club Toolkit for states, which includes FAQs, templates, and downloadable presentations and flyers. You can find the toolkit in the Membership Resources of the State Support Center at www.schoolnutrition.org/StateSupport.
6. School District Owned Membership (SDM)

In July 2007, SNA’s House of Delegates approved three bylaw amendments that enable SNA to offer School District (or State Agency) Owned Memberships (SDM) for personnel working in school nutrition programs as an option in addition to the standard individual memberships. SNA will continue to offer individual memberships as it has for the past 60-plus years, but SDMs are also now an option for school districts and state agencies.

- School District Owned (or State Agency Owned) Membership (SDM) is an alternative to standard individual memberships and designed to meet the needs of the changing workforce by enabling school districts to keep school nutrition staff informed and educated about feeding students. The goal of SDM is to make it easier for school districts to pay for memberships and allow their employees to enjoy the many benefits of SNA membership.

- SDM is a membership that is owned by a school district in the name of an individual and is transferrable to another employee in the same membership category if the original assignee leaves the district. This is not one membership for an entire district, but separate memberships that are transferrable. SDMs receive all the same benefits as an individual member at the same price as individual membership dues (Note: SDM is not available for the Student, Retired and Affiliate membership categories). SDM can be used for new and renewing memberships and SNA will work with districts to align existing expiration dates so that all SDMs expire at the same time.

- All SDM districts must designate an SDM administrator. This is the individual who is authorized to transfer memberships and will also be sent the renewals (via email) either once or twice a year.

‘5 and 1 Free’ Incentive

To encourage participation in this membership option, SNA is offering an incentive for free memberships that are new SDMs. For every five (5) new SDMs in the School Nutrition Employee (SNE) or School Nutrition Manager (SNM) membership category, the district can receive one free new membership in the same (SNE or SNM) category (both national and state dues are free as well as the processing fee). This incentive is valid through December 31, 2016 and does not include state agency members.
SDM GUIDE
SNA has put together a guide on SDM including an overview of this membership option, details on how to get started as well as FAQs. The guide is available to download at www.schoolnutrition.org/sdm.

SDM Categories and Dues
- Membership dues for SDMs will be the same as individual memberships. Note: SDM is not available for the Student, Retired and Affiliate membership categories.

<table>
<thead>
<tr>
<th>Member Type</th>
<th>Individual Membership</th>
<th>School District/Agency Owned Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>FN Employee</td>
<td>$30</td>
<td>$30</td>
</tr>
<tr>
<td>FN Manager</td>
<td>$32</td>
<td>$32</td>
</tr>
<tr>
<td>District Directors &amp; Supervisor</td>
<td>$110</td>
<td>$110</td>
</tr>
<tr>
<td>Major City Directors &amp; Supervisor</td>
<td>$110</td>
<td>$110</td>
</tr>
<tr>
<td>State Agency Personnel</td>
<td>$110</td>
<td>$110</td>
</tr>
<tr>
<td>Nutrition Educators</td>
<td>$110</td>
<td>$110</td>
</tr>
<tr>
<td>Other</td>
<td>$110</td>
<td>$110</td>
</tr>
<tr>
<td>Retired</td>
<td>$30</td>
<td>NA</td>
</tr>
<tr>
<td>Students</td>
<td>$30</td>
<td>NA</td>
</tr>
<tr>
<td>Affiliates</td>
<td>$16</td>
<td>NA</td>
</tr>
</tbody>
</table>

Check out the State Support Center!
You’ll find the current SDM guide, the form to use to request membership materials for your state, resources to help you promote the Star Club and more!
Membership Recruitment

There are generally three basic reasons why a person decides to join a professional association:

1. Peer recognition
2. Job opportunities and career advancement
3. Continuing education

These three reasons are prioritized differently for individual members; however, each one tends to be a driving force behind why someone joins an association.

Recruitment Basics for All Members

Research shows that most new members join an association through existing members. To be successful in recruiting members, you have to clearly understand the services offered by the association and how membership in the School Nutrition Association (SNA) will benefit the potential new member. Recruiting new members to join the association is both fun and rewarding. Who better to sell a membership in SNA than you? You are simply helping your colleagues by providing them with the resources available to maximize their potential. Below is a list of suggestions and tips on recruiting, including what to do if faced with objections about joining SNA. Good luck and happy recruiting!

Know the Benefits of SNA Membership

Before speaking with potential new members of SNA, be sure to brush up on all of the wonderful benefits SNA provides its members. Below is a list of benefits which you can use as talking points when trying to recruit new members:

- **Ability to Learn from Others in the Industry** – Meet and network with school nutrition directors and employees from around the country who are dealing with similar issues and problems. Share insight and creative ideas that will strengthen school nutrition programs.

- **Develop Yourself** – Continue to grow and learn with SNA’s workshops and classes on everything from nutrition and management strategies to marketing. Take advantage of SNA’s certificate and/or credentialing program that offers members the opportunity to further their professional growth.

- **Know Your Industry** – Through the award-winning School Nutrition magazine, SNA’s website, and several email newsletters, stay on top of the many developments in the school industry, from new regulations to new recipes.

- **Your Political Voice** – Make your concerns heard. SNA makes sure that you always have a voice, and your concerns are acted upon in Washington, D.C. SNA offers training on how to talk to your representatives about what is important to you.
• **Reliable Research** – Access ongoing critical school nutrition research that you may not find anywhere else.

• **Scholarships for Success** – Through SNA’s sister organization, the School Nutrition Foundation (SNF), members have access to grants and scholarships that can help you meet your continuing education needs, attend conferences and upgrade kitchen equipment.

• **Educating the Public** – Stay informed about news in school nutrition programs to use in working with the media, from talking points and press releases to public service announcements and position statements.

• **Member-Only Discounts** – Enjoy a variety of discounts on products and programs, including SNA conferences, certificate, publications, research, Emporium shop purchases and insurance.

• **Career Center** – SNA has a Career Center on its website where you can post your job openings, look for career opportunities or post your resume for prospective employers to view.

SNA also has information about membership benefits and a downloadable video you can use at www.schoolnutrition.org/membership.

**Plan a Personal Visit**

Personal visits work best because of the face-to-face contact. This allows potential new members to see as well as hear your enthusiasm when you tell them why you belong to SNA.

1. Schedule a time with the potential member when you will both be free from distractions.
2. Establish a personal rapport by talking about things of interest (family, work, hobbies, etc.)
3. Ask if he or she is aware of SNA and what it does.
4. Tell the potential members how long you have been a member and why you joined SNA. Relate this in personal terms, e.g., what you learn at meetings or ANC, and how you have benefited by networking with your peers.
5. Ask the prospective member if he or she has any questions about membership, the association or joining. Prospects may have reasons they cannot join the association. Be prepared with an answer to the objection. Refer to the list of standard objections and suggestions on handling them on the following page.
6. **Ask the individual to join.** It sounds simple but many people do not join clubs or associations because no one has asked them. Bring an application and a brochure with you to the visit. Always ask, as it’s a win-win situation for you and the new member.

Example below: “[Prospective Member’s Name] I invite you to become a member of SNA, which I truly believe will help you, your career, your school district, your community and the students who you serve each and every day. It could be the best investment you’ll ever make. You’ll have fun and make long-lasting friendships. Can I count on you becoming a member of SNA?”
Send Personal Letters
1) Always personalize the letter wherever possible. You may use the sample letter provided to send to prospective members.
2) Use professional or personalized stationary.
3) If sending a letter, it is best to follow-up with a phone call to answer any questions the prospective member may have about the association.

Call Potential New Members
1) Prepare for the conversation before making the call. Set up goals for the call, which will help you stay focused on why you are calling.
2) Identify yourself and your association. Establish rapport with prospective member with small talk.
3) State your reason for call and deliver your message

Check out the State Support Center!
You’ll find a sample membership recruitment elevator speech, a sample recruitment letter, sample responses to common membership objections and information on running your own membership campaign.

STATE SUPPORT CENTER
schenkcommunications.org/statesupport
Membership Retention

Member retention ranks among the most important responsibilities of an organization and begins as soon as a member joins. Dues from renewing members represent a significant source of income for most associations. Thus, a high retention rate helps to ensure a steady flow of revenue, enabling associations to better plan and manage their resources.

Not all members readily renew; some require persuasion. There is no right or wrong way to encourage members to renew. Some associations send letters, and others make phone calls. In addition to the first renewal notice, SNA sends a second notice with a letter from SNA’s President reminding the lapsed member that they have not yet renewed their membership and the benefits they will miss out on if they do not renew. We also send out an email to expired members with a link to a short survey asking them why they do not renew. The good news is that for the most part, our members do not renew because they are no longer working in the industry or have retired (rather than dissatisfaction with the association).

Many state affiliates also send out reminders to these lapsed members. Every month, state affiliates should check My Account for their state’s grace members (members who failed to pay dues in the month that they were due) and expired members (members whose dues are three months past due). Some ideas to get these members to rejoin SNA include:

- Send a friendly letter to grace members reminding them that their dues are past due. Reinforce state and national benefits they will miss out on.
- Send a letter to members whose membership has expired inviting them to rejoin. Some associations offer discounts to these members; however, that is risky because it could upset longstanding members who pay the full price.
- Place phone calls to certain targeted groups, such as directors or managers, who have not renewed their memberships. Ask your membership chair and committee to make these phone calls or reach out to local chapter leaders for support in this effort.

Whether you send one letter or place phone calls depends on your members. Some associations focus on the message of a loss of benefits from not renewing; others remind members what they will gain by renewing. Whatever the particular tactic, strong, positive, honest communication directed to the member’s interests, concerns, and needs can convince a member to renew.
Lost Members vs Late Members

There is a difference between lost members and late members. Often, an association will remove a member for nonpayment of dues without finding out the reason for non-renewal. Because it is easier to keep a member than to recruit a new one, considerable energy should be expended on retention. One should make sure that the member did not simply overlook payment—something that can easily happen in today’s busy world.

If a member fails to renew, it is important to find out if you are dealing with a lost or a late member. It is critical to contact members who fail to respond. A member who drops out because of poor service is a walking testimonial against the association. Research has shown that disgruntled customers will tell four others of their negative experience, while happy customers will tell only one about their positive experience. Dissatisfied members can hurt retention.

Members may resign because they are no longer involved in the industry or the profession. Finding out why a member resigned affords opportunities to assuage negative feelings. Even if the member cannot be retained, a conciliatory gesture may prevent them from expressing negative thoughts to others and could even pave the way to rejoin at a later date.
Membership Engagement

Keeping members engaged will ensure that members feel they are benefiting by being a part of SNA and the state association and will help you build a pool of potential leaders who can one day serve on your committees and boards.

Ideas from State Associations

Many state leaders look to SNA for ideas about what their state association should be doing. What a state association can do hinges on several factors, including the number of active members, resources and finances available. Be sure to consider your state resources when you plan for the year ahead and the membership engagement activities you’ll undertake.

Listed below are a few ideas of what some state associations are doing to encourage membership growth and engagement:

• Hosting an annual state conference to provide learning and networking opportunities
  • The Professional Standards Training Guidelines and template tracking grid, created by SNA and available in the Professional Development Resources section of the State Support Center, can help you create an agenda that helps your members meet their professional standards annual training requirements.
• Collaborating with state agencies to develop professional development programs
• Promoting the SNA Certificate Program and the SNS Credential to your members to help them further their careers and show their dedication to the school nutrition profession
• Participating in SNAC Chats (webinars held quarterly) to gain insights about the latest programs from SNA and then sharing those programs and ideas with their state members
• Using the online membership resources to promote membership in their state association. You can find the membership recruitment toolbox (and more!) in the State Support Center.
• Incorporating SNAC Bites (monthly newsletter pieces provided by SNA) in your communications to members to encourage them to understand and regularly utilize their membership benefits
• Providing leadership training for members
• Lobbying state legislators regarding child nutrition programs
• Promoting and implementing public relations campaigns to heighten awareness and quality of school meal programs
• Establishing scholarships in honor or memory of outstanding supporters and champions of child nutrition
• Utilize newsletter article promoting national membership in state publication
• Participating in civic and community events
• Hosting golf tournaments and other sporting events
• Hosting silent auctions and other fundraisers
• Conducting a statewide membership drive to encourage recruitment
• Conducting workshops on healthy eating and sound nutrition practices
• Supporting local chapters by providing trainings, attending meetings, and helping them work through issues and celebrate successes
- Promoting participation in SNA member benefit programs—such as the STEPS wellness challenge, SNA Awards Program SNF Scholarships, SNA Star Club, etc. While these are only a few ideas, it is important to remember not to measure the success of your state association against that of another. Each state affiliate is unique and brings important ideas, suggestions and energy to the Association as a whole. The important thing is that the sharing of ideas and experiences will help strengthen not only state associations, but also the school nutrition industry.

Check out the State Support Center!
You’ll find lots of resources to help you engage your members and help them connect to their benefits—such as newsletter ads for SNA programs, professional development resources and more!
Marketing Matters: Leverage SNA Programs to Engage Your Members

SNA has multiple school nutrition programs and events to help SNA members promote their school nutrition programs to students, parents, school administrators, and the community. Below is information about each program (along with a tutorial of social media) which you can share with your members.

National School Breakfast Week
What is it?
National School Breakfast Week (NSBW) is a week-long celebration of the School Breakfast Program. Schools use it to bring attention to the program and convey the benefits of school breakfast to students, parents, administrators, and the entire community.

Why should members get involved?
Recognizing NSBW can help you increase breakfast participation! It also provides a great opportunity to connect with stakeholders and the school community. NSBW gives local media a reason to cover your school nutrition program. It gives you a platform to reach the PTA or school administrators. Additionally, it’s an excuse to make your cafeterias extra fun and inviting for students! Each year, SNA creates a new campaign theme for NSBW to freshen the look and keep it updated.

When does NSBW take place?
NSBW is always the first full week of March. The 2017 theme is “Take the School Breakfast Challenge”. In a departure from typical NSBW approach, this specific call to action would be a national public awareness message to families nationwide encouraging their children to try school breakfast for a week and take note of how it works for them. If the timing in early March doesn’t work for you (maybe you have a teacher work day or other conflict) you can celebrate anytime.

How should your state’s districts participate?
You can organize a promotion as basic or big as you’d like – depending on your budget, resources, and time. School districts typically celebrate with events and programs like:
  - Decorating the cafeteria with posters and balloons
  - Sending a Backpack Brochure home to parents
  - Inviting special guests to attend breakfast and even serve on the line
  - Offering special menu items to students
These are just samples of celebration ideas! Put your thinking cap on and plan a perfect celebration for you and your team.

Where can members get help?
Visit [www.schoolnutrition.org/NSBW](http://www.schoolnutrition.org/NSBW) to access all of SNA’s NSBW tools. You’ll find downloadable PDFs full of ideas, handouts for kids and parents, marketing and social media tools, and so much more. You can also shop for NSBW merchandise like posters, t-shirts, aprons, and much more online at [emporium.schoolnutrition.org](http://emporium.schoolnutrition.org).
**National School Lunch Week**

**What is it?**
National School Lunch Week (NSLW) is a week-long celebration of the School Lunch Program. Schools use it to bring attention to the program and convey the benefits of school lunch to students, parents, administrators, and the entire community.

**Why should members get involved?**
Recognizing NSLW can help you increase lunch participation! It also provides a great opportunity to connect with stakeholders and the school community. NSLW gives local media a reason to cover your school nutrition program. It gives you a platform to reach the PTA or school administrators. Additionally, it’s an excuse to make your cafeterias extra fun and inviting for students!
Each year, SNA creates a new campaign theme for NSLW to freshen the look and keep it new.

**When does NSLW take place?**
NSLW is always the second full week of October. The 2016 theme, “School Lunch: Show Your Spirit!” capitalizes on all the fun and excitement of a pep rally – high energy, unity, sports, and fun. If the early October timing doesn’t work for you (maybe you have a teacher work day or other conflict) you can celebrate anytime.

**How should your school districts participate?**
You can organize a promotion as basic or big as you’d like – depending on your budget, resources, and time. School districts typically celebrate with events and programs like:
- Decorating the cafeteria with posters and balloons
- Sending a Backpack Brochure home to parents
- Inviting special guests to attend breakfast and even serve on the line
- Offering special menu items to students

These are just samples of celebration ideas! Put your thinking cap on and plan a perfect celebration for you and your team.

**Where can members get help?**
Visit [www.schoolnutrition.org/NSLW](http://www.schoolnutrition.org/NSLW) to access all of SNA’s NSBW tools. You’ll find downloadable PDFs full of ideas, handouts for kids and parents, marketing and social media tools, and so much more.
You can also shop for NSLW merchandise like posters, t-shirts, aprons, and much more online at [emporium.schoolnutrition.org](http://emporium.schoolnutrition.org).
School Lunch Hero Day
Look! In the cafeteria! It’s not a bird, or a plane, but school nutrition professionals sure are heroes. School Lunch Hero Day is a special day of celebration for the hardworking employees in school cafeterias across the country. SNA created this special day with Jarrett Krosoczka, author of the “Lunch Lady” graphic novel series.

When is it?
School Lunch Hero Day is always held on the first Friday of May.

How do members participate?
Use this opportunity to recognize the school nutrition professionals in your school district! Consider reaching out to parents, school administrators, and students to encourage them to show their appreciation via:
  o Cards or simple, inexpensive gifts (like flowers)
  o Signs, posters, or balloons in the cafeteria
  o A special shout-out during the morning announcements at school
  o Give the gift of SNA membership!

Where can members get help?
Visit www.schoolnutrition.org/HeroDay for more ideas and tips. You can also shop official School Lunch Hero Day merchandise at emporium.schoolnutrition.org.
The STEPS Challenge
Want to improve your health and wellness? You’re not alone. Consider joining the 6,000+ SNA members that have registered for the STEPS Challenge, SNA’s personal wellness program just for school nutrition professionals.

What is it?
A personal wellness program, created just for school nutrition professionals! Get healthier, happier, and more active with this free program from SNA. Any member can participate, regardless of your resources or fitness level.

Why sign up?
- Gain access to fitness tips and workout ideas, 25+ healthy recipes, a 15+ page toolkit, and more.
- Participate in monthly health challenges for a chance to win prizes.
- Embrace small habits that can add up to make a big difference in your health!

Monthly challenges
Switching to a healthier lifestyle can be daunting. To help you take small steps towards better health, each month, you’ll begin a new challenge. Whether it’s eating more fruit, walking more, or switching to whole grains, each monthly challenge is different. Participating is easy:

- Download and print your monthly tracking sheet
- All month long, record points on the sheet when you make healthy choices
- At the end of the month, add up your points. If you earned 50+ points, you’re eligible to win a prize – just enter them online to

Prizes
- Cookbooks, workout DVDs, gift certificates, spa trips – Five STEPS challenge participants win exciting healthy prizes every month, just for participating in challenges.
- The Grand prize for 2014-2015 is an all-expense paid trip for two to attend ANC 2015 in Salt Lake City!

Share STEPS with Your State
SNA has tools and resources available to help you promote STEPS with your state association members including a PowerPoint presentation, handout, conference badge ribbons, and more.

Why wait? Start living healthier and feeling energized today! Sign up and learn more at:

www.schoolnutrition.org/STEPS
Social Media
Are you stumped by social? Had it with hashtags? Social media can be a very effective tool to communicate all of the good news from your school district – but it takes time to build up a following! Below, you’ll find a quick primer on the various platforms you can use to promote your program to various online audiences:

**Facebook** is a great platform to share photos from the lunchroom – here you can share shots of healthy trays, smiling kids in the cafeteria, etc.

**Twitter** is all about quick, short, updates. You can connect with other users and it’s a great platform to develop relationships with your local media, community organizations, and activists.

If you’re not on **LinkedIn** yet, you should be - this is a great place for online networking, learning, and job searching. LinkedIn is a great platform for you to be on personally, even if it doesn’t necessarily work for you to promote your program.

If you’ve got a SmartPhone, you can install the **Instagram** app and share photos from your district here. Use filters to give your photos a cool effect, and add #hashtagsother users can see your posts, too.

**YouTube** Share videos from your school district on **YouTube**! Creating a video is a great way to introduce people to your school nutrition program

**Pinterest** Think of **Pinterest** as an online scrapbook – you can assemble recipes, photos, inspiration, and more. It can be a mix of your own photos, recipes you find online, and fun ideas for marketing and food styling on the cafeteria lines.

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**Socialize with SNA!**

*Find us online for updates, stories, and fun:*

**Facebook:** www.facebook.com/SchoolNutritionAssociation

**Twitter:** @SchoolLunch

**LinkedIn:** School Nutrition Association (members-only group)

**Instagram:** @schoolnutritionassoc
Chapter 4:
Bylaws, Policies, & Procedures
### Governance Documents Hierarchy

Below is a chart from A Great Meeting, Inc., outlining the hierarchy of governance documents.

<table>
<thead>
<tr>
<th>Type</th>
<th>Source</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outside mandate:</strong></td>
<td>Federal, state, local laws</td>
<td>Federal law is the highest governing document, followed by state and then local laws. The most common example of state laws that affect some associations are the sunshine, or open meeting, laws. In general, these laws are designed to bring transparency to the association’s activities.</td>
</tr>
<tr>
<td><strong>Outside control:</strong></td>
<td>Articles of incorporation</td>
<td>The articles of incorporation (also called the charter) is the legal document that gives an association its name and legal status. The statutes of the state of incorporation mandate the content and method of amendment for the articles.</td>
</tr>
<tr>
<td><strong>Internal control:</strong></td>
<td>Bylaws</td>
<td>This member-owned document describes the structure and flow of authority of an association. The members decide by a provision in the bylaws how the document can be changed. Rules in the bylaws cannot be suspended, unless the conditions under which they can be suspended are specifically included in the bylaws. Bylaws should be reviewed at least every five years to ensure they reflect current governance.</td>
</tr>
<tr>
<td><strong>Internal control:</strong></td>
<td>Special rules of order</td>
<td>In cases where the members want to conduct business in a way that differs from the adopted parliamentary authority, special rules of order are adopted. For example, <em>Robert’s Rules of Order Newly Revised</em> (RONR) allows each person to speak for ten minutes when recognized. A special rule of order can be adopted to limit debate time to two minutes.</td>
</tr>
<tr>
<td><strong>Internal mandate:</strong></td>
<td>Parliamentary authority</td>
<td>A parliamentary authority is a book of procedural rules that can serve an association in conducting business during meetings. Adopting a parliamentary authority allows an association to function under generally accepted procedures that ensure fairness. The most widely used parliamentary authority is <em>Robert’s Rules of Order Newly Revised</em>, currently in the eleventh edition.</td>
</tr>
<tr>
<td><strong>Internal control:</strong></td>
<td>Standing rules</td>
<td>In general, standing rules are the rules regarding the administration of an association, rather than its decision-making process. However, board standing rules are a document that often contains both procedural rules for the board and administrative rules</td>
</tr>
<tr>
<td>Type</td>
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<td>Description</td>
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</tr>
<tr>
<td><strong>Internal control</strong>: rules created and revised by members</td>
<td>Policies</td>
<td>Policy is a common term not found in RONR, and the definition is dependent on the setting. A policy might be an ideal: “We do not tolerate harassment in any form.” A policy might set forth a rule: “It is our policy to prosecute shoplifters.” Or, a policy might define how a rule will be carried out. Because of the multiple meanings and confusion over interpretation, we recommend using the term only when a clear definition is provided.</td>
</tr>
<tr>
<td><strong>Internal control</strong>: rules created and revised by members</td>
<td>Procedures</td>
<td>Procedures are the administrative tasks that must be performed in order to carry out or enforce a rule. Boards that get very involved in procedures are often called micromanaging boards. It is usually considered good practice to set the project boundaries and let those responsible for the project carry it out in their own way.</td>
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State Association Bylaws

A good, professional organization needs a workable set of bylaws to establish its structure, serve as a guide in conducting meetings and enable it to function efficiently. However, bylaws must also be fluid enough to adapt to changing conditions and environments.

SNA is constantly reviewing its bylaws to be sure they are in compliance with current rules and policies. SNA’s Resolutions and Bylaws Committee is charged annually with reviewing SNA’s bylaws to ensure that they are in compliance with SNA’s current policies, procedures and any new national government regulations or laws.

Each state and local chapter association needs a set of bylaws that are compatible, and not in conflict with the SNA’s bylaws. In addition, state bylaws should be reviewed annually to ensure that they are in compliance with SNA’s bylaws.

Sample State Articles of Incorporation and Bylaws Outline

The following outline includes elements of a typical state bylaw structure and is a recommended guideline for developing State Affiliate Bylaws:

**ARTICLES OF INCORPORATION**

Article I: Name
Article II: Purpose
Article III: Term
Article IV: Membership
Article V: Management
Article VI: Registered Office and Agent
Article VII: Tax Exempt Status
Article VIII: Dissolution
Article IX: Limitation of Liability

*Please note that the Articles of Incorporation are no longer included in the SNA Bylaws.*

**BYLAWS**

Article I - Membership
- Section 1. Membership Categories
- Section 2. Suspension and Termination of Membership
- Section 3. Regions

Article II - Chartered Affiliates
- Section 1. Definition
- Section 2. Purpose
- Section 3. Representation

Article III - Officers
- Section 1. Officers
• Section 2. Eligibility
• Section 3. Election and Term of Office
• Section 4. Succession
• Section 5. Vacancy

**Article IV - Board of Directors**
• Section 1. Composition
• Section 2. Authority
• Section 3. Meetings
• Section 4. Eligibility
• Section 5. Election and Terms of Office
• Section 6. Vacancies and Removal
• Section 7. Director Responsibilities
• Section 8. Executive Committee

**Article V - Delegate Assembly/House of Delegates (if applicable)**
• Section 1. Composition
• Section 2. Responsibilities
• Section 3. Resolutions and Position Statements

**Article VI - Sections**

**Article VII - Committees and Advisory Councils**
• Section 1. Standing Committees
• Section 2. Financial Committee
• Section 3. Leadership Development Committee
• Section 4. Resolutions and Bylaws Committee

**Article VIII - Certificate and Credentialing Governing Council**

**Article IX - International Affiliates**

**Article X - Parliamentary Authority**

**Article XI - Amendment**
• Section A. Method of Proposal
• Section B. Procedure for Amending Bylaws and Standing Rules

**Tips for Writing Chapter Bylaws**
• Refer to the current copy of the Governing Rules of SNA to ensure compliance with Association Bylaws.
• Contact the Regional Director and/or Regional Representative on the Resolutions and Bylaws Committee for additional assistance in reviewing Bylaws and drafting amendments to the Bylaws.
• States should amend their bylaws to coincide with SNA’s Bylaws when necessary.
State Association Policies and Procedures

Along with bylaws, state associations should also create policies and procedures. Policies are adopted by the Board of Directors to define the operations of the organization. In comparison to bylaws, which are rigid and take time to change, policies are less formal and more adaptable. Whereas bylaws may only be changed by the House of Delegates, policies may be changed by the Board of Directors. Policies are usually longer than bylaws. While policies pertain to the details, the bylaws are high-level. Bylaws take precedent over policies, and policies must be in harmony (not conflict) with the bylaws.

Below is a chart outlining these differences and similarities between bylaws and policies:

<table>
<thead>
<tr>
<th>Bylaws</th>
<th>Policies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundamental governing rules of the</td>
<td>Define the operations of the organization</td>
</tr>
<tr>
<td>organization</td>
<td></td>
</tr>
<tr>
<td>High-level</td>
<td>Details-oriented</td>
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<tr>
<td>Changes may be made only by the House of</td>
<td>Changes may be made by the Board of Directors</td>
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<td>Delegates</td>
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<tr>
<td>Rigid, process to change is slower/more</td>
<td>Adaptable, process to change is easier/faster</td>
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<tr>
<td>difficult</td>
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<tr>
<td>Formal</td>
<td>Less formal</td>
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<tr>
<td>Shorter</td>
<td>Longer</td>
</tr>
<tr>
<td>Take precedent</td>
<td>Must be in harmony with the bylaws</td>
</tr>
</tbody>
</table>

State policies should be written and shared with your Board of Directors. It is important to create an understanding of expectations. Policies associations may have include: operations, awards, dress code, finances, attendance, conflict of interest, etc.

The bylaws and policies of state, national and local chapters of SNA must all be in harmony with each other.

SNA currently has policies on:

- Advertising Standards
- Antitrust Policy
- Awards Policies
- Board of Directors Standard of Business Conduct Policy
- Board of Directors Whistleblower Policy
- Candidate Campaign Guidelines
- Conflict of Interest Policy
- Conflict of Interest Policy for the Industry Representative
- Meetings Policies
- Record Retention and Document Destruction Policy
- Reserve Investment Policy
• Sponsorship Policy
• Travel Reimbursement Policy

SNA also has a number of procedures which are even more detail-oriented, internal, and flexible than policies. SNA procedures may be created and changed at SNA headquarters, as needed. Procedures are less formal and more adaptable than policies. While all policies should be shared with your Board of Directors, procedures can be shared on a need-to-know basis.
Following Your Bylaws, Policies and Procedures

Understanding your state association’s bylaws, policies and procedures is essential to running your association effectively and legally. Here are some tips to help your state association follow your bylaws, policies and procedures:

- Hold an orientation for your state board every year. At the orientation, provide each board member with a copy of the state association’s bylaws, policies, and procedures. Walk through each important document and explain what each document contains. Bylaws can be difficult or overwhelming to read for individuals who have no experience. Be sure to take questions and help each board member understand how to use each document as a reference.

- Share your bylaws with chapter leaders every year. Chapter bylaws should always be in line with state association bylaws. Chapter leaders will be better prepared if they have the correct bylaws to review. If you have a chapter leaders orientation, walk through the bylaws with them.

- When questions come up about processes and procedures (such as if your President-elect resigns or if you’d like to change your state dues), don’t guess what you should do! Check your bylaws, policies and procedures for specific details and for guidance. Once you find the guidance, be sure to follow it as best you can. Remember- not following your bylaws can open you and your state association up to criticism and legal issues.

- Check the SNA online state bylaws library if you need inspiration from other states about how to update your bylaws.

- Send a copy of your state bylaws to SNA headquarters at StateSupport@schoolnutrition.org on an annual basis. SNA headquarters staff will post your bylaws in the online state bylaws library. If you ever need help interpreting your bylaws, you may call SNA for assistance.

Check out the State Support Center!
You’ll find a current library of state bylaws, sample policy and procedure manuals from state associations, SNA policies and more!

schoolnutrition.org/statesupport
Chapter 5:
Finances & Budgeting
Financial Practices and Systems

Establishing sound guidelines for the financial operations of the association is key to its success. The following are the essential elements of an association’s financial system: an annual budget, financial reports, tax-reporting and financial controls.

Annual Budget

The association’s annual budget is the foundation of a sound financial system. The annual budget is a financial plan built on assumptions that grow out of an association’s experiences and expectations. Some of the steps in the process are:

Getting the Facts:

- Project the number of members estimated for the coming year. This should be based on recent membership trends, specific plans to increase membership or membership income, possible obstacles to membership growth, etc. Midway through a fiscal year, expenses can be curtailed to balance a budget; overestimated income cannot be generated.

- Review association projects that produce income or generate expenses, as well as any new projects planned for the coming year. Build in assumptions for attendance (if that is the nature of the project), participation, unusual expenses, etc. Before setting income or expense projections, carefully construct the assumptions for creating that income or expense. Do your homework!

- Review basic operational expenses and investigate any possible changes, e.g., rent or utility increases, postage costs, payroll, meeting facilities, etc. Carrying over expense projections from one year to the next should be avoided. Check it out!

Projecting Income and Expense:

- Compute dues and non-dues revenue carefully. Ideally, associations attempt to maintain a set percent of income from dues and the remainder from non-dues projects, such as educational programs, meetings, fundraising events, etc. A good rule to follow in estimating income and expenses is to underestimate income and overestimate expenses.

- In estimating expenses, look carefully at variable versus fixed expenses. For example, a projected increase in membership, and therefore revenue, might increase variable costs, such as printing, mailing supplies and postage.
• Compare expected income and expenses. If budgeted expenses exceed revenue, as they often do the first time around, revisit the expenses and trim costs. Resist increasing anticipated revenue unless your assumptions are sound.

Next Steps:

• Present the income and expense budget as a single document, but in at least two formats. First present the dollars budgeted for each income and expense account. In a second document, present briefly the assumptions on which those numbers are built. This then becomes the financial plan for the coming year.

• Present the proposed budget to the assigned oversight committee, i.e., the budget or finance committee. Following this step, the final budget should be presented to the Executive Board for its review and approval.

• Budget figures should be included in financial reports during the fiscal year and should be compared to actual financial results.
Creating Financial Reports

Regular financial reports detailing the association’s current financial situation should be prepared and presented to the proper individuals or groups. The frequency of financial reporting should be no more than monthly and no less than quarterly. The reports, which should show the costs of actual items versus the cost of budgeted items, should summarize all financial activities for that period. There should always be a financial report at the end of the fiscal year, as well. Annual reports should summarize all financial activity within the association's fiscal year.

The level of financial detail reported will vary depending on the size and complexity of the association, as well as the presence, size and skills of the staff, etc. However, regardless of these factors, the monthly or quarterly report should contain a summary of assets and liabilities, and Revenues and Expense compared to the budget.

Annual financial reports should show budget amounts for the current and the previous fiscal year. Below is a checklist for association leaders that explains the various ways to create financial reports.

- All financial reports should be accurate and thorough. The presentation or format of the report depends on the users of the financial information. The Board of Directors is responsible for the oversight of the financial situation of the association; therefore, financial reports should be prepared to address their concerns.

- Financial reports should be timely.

- Monthly or quarterly reports should indicate specific accounts receivable and accounts payable information. In other words, monthly or quarterly reports should identify members who have not yet paid their dues and vendors who the association has not yet paid.

- Annual financial reports should include:
  - Asset and liability summaries
  - Annual revenues and expenses
  - Budget amounts for current and previous fiscal years

- If possible, the association should have its financial reports and records audited by an accounting firm or an independent third party. If an audit is too expensive, another option would be an independent review of the financial statements.
Tax Reporting

While an association can be organized as a non-profit organization, it does not mean that the organization does not have to file tax returns, nor does it mean that the association does not have to apply for tax-exempt status. These are both issues that need to be discussed with the association’s legal counsel and accountant.

Tax Forms

The following are a few of the IRS forms that many associations need to file:

- **Form 1024** – Application for Tax Exemption from federal taxes for dues-related income.
- **Form SS-4** – Application for Employer Identification Number (EIN), required of all associations to verify tax-exempt status.
- **Form 990** – Tax Return of an Organization Exempt from Income Tax. Most organizations exempt from income tax under section 501(a) must file an annual information return (Form 990 or 990EZ) or submit an annual electronic notice (Form 990-N), depending upon organization’s gross receipts and total assets.
- **Form 990N** – Electronic Notice for Tax-Exempt Organizations Not Required to File Form 990 or 990-EZ, applicable if gross receipts total $50,000 or less.
- **Form 990-EZ** – Short Form. Associations that have gross receipts of less than $200,000 and total assets less than $500,000 can qualify to file this form.
- **Form 990T** – Exempt Organization Business Income Tax Return. Required of an association if collects more than $1,000 in unrelated business income (UBI).
- **Form 940** – Employer’s Annual Federal Unemployment Tax Return.
- **Form 941** – Employer’s Quarterly Federal Tax Return.
  - Both of these forms are only required if the association hires an employee paid by the association.

Tax Deadlines

The following are some of the common tax-filing deadlines. Again, these issues need to be discussed with the association’s legal counsel and accountant.

- **January 31**: Association employees should receive a completed W-2 Federal Unemployment Tax (FUTA) File 940 or 940 EZ – Employer’s Annual Federal Unemployment Tax Return.

- **February 15**: Request a Form W-4 (Employees Withholding Allowance Certificate) from each employee who claimed total exemption from withholding during the prior year.

- **February 16**: Begin withholding for each employee who previously claimed exemption from withholding but who has not provided the association with a new W-4.
• **February (last day):** Income tax withholding. File:
  o Form W-3 (Transmittal of Income and Tax Statements) with the Social Security Administration (SSA) and file Copy A of all W-2 Forms for employees for the previous year.
  o Form 1099 Information and Form 1096 need to be filed with the IRS.

• **April 30, July 31, October 31 and January 31**
  o Deposit federal unemployment tax due if more than $100. File Form 941 (Employer’s Quarterly Federal Tax Return) or Form 941-E (Quarterly Return of Withheld Federal Income Tax).
  o Pay any undeposited income and social security taxes.

• **15th day of the fifth month after close of association’s tax year.**
  o Return Organization Exempt from Income Tax Form. Form 990EZ may be used for organizations with gross receipts less than $100,000 and total assets less than $250,000. All others use Form 990.
  o Associations with unrelated income of $1,000 or more must file Form 990T. They must pay estimated tax payments on the 15th of the 4th, 6th, and 9th months of the tax year and the first month of the following year.

• **15th day of the third month after the close of the tax year**
  o For-profit corporations must file Form 1120 or 1120K.

**Internal Financial Controls**
The following are examples of ways associations can improve internal financial controls:

• Require dual signatures for all withdrawals on association accounts, with both co-signers being aware of the association’s current financial standing.
• Prohibit the pre-signing of multiple checks.
• Be extremely selective in the use of association credit cards.
• Dedicate more than one person to collecting and handling cash at association events.
• Make regular financial reporting part of the association’s operations.
• Require an annual review of association financial reports and records by independent third parties.
Incorporating Your Association

This is a checklist for association leaders that explains how to incorporate your association and obtain Articles of Incorporation for your state association. The Articles of Incorporation are the official documents recognizing the existence of the SNA state affiliate. Articles of Incorporation classify the association’s tax status as well as protect the association's directors, members and staff from the association's liabilities. While each state has different incorporating requirements, the checklist below provides a comprehensive list of items generally needed to incorporate.

• Contact the Office of the Secretary of State in your state capital for specific filing requirements. Telephone numbers for the Secretary of State’s office can usually be found in the State Government section of a local telephone book or on the web.

• Obtain a current set of SNA’s bylaws. Make sure the state’s bylaws have been updated to include current operating procedures and policies, and comply with SNA standards.

• You may submit your local bylaws for review to your Regional Director or your Regional Representative on the Resolution and Bylaws Committee.

• Compile any and all Board of Directors meeting minutes that indicate the association’s desire to incorporate.

• Obtain proof of tax-exempt status (if incorporating as a nonprofit organization) from the Internal Revenue Service. To find out how to obtain proof of tax-exempt status, see the next page.

• Make sure your association meets regularly.
Applying for Tax-Exempt Status

This is a checklist for association leaders that explains how to apply for tax-exempt status from the Internal Revenue Service. Each state association that wants to operate as a nonprofit organization must apply for tax-exempt status.

- If your association has been in existence for some time, and you are unsure about its status with the state, contact the Office of the Secretary of State in your state to see if copies of the association’s Articles of Incorporation are on file. Generally, if the association incorporated as a nonprofit association, material affirming tax-exempt status will be included with the Articles.

- If your state association is applying for tax-exempt status for the first time, contact the appropriate Internal Revenue Service (IRS) district office. Regional IRS offices are generally found in the Federal Government section of a local telephone book.

- Obtain and complete IRS Form 1024 from the IRS. It normally takes the IRS about 90 days to issue a determination letter approving or denying the association's request. For an association to be approved as a tax-exempt association, they must meet the following requirements:
  - The state School Nutrition Association (SNA) must be a nonprofit. It must be organized and operated so as to improve general business conditions as opposed to private purposes. Neither the income nor the assets of the association can be payable to the benefit of the association’s members or private individuals except in arms-length transactions for fair value (e.g., staff salaries, payments to vendors).
  - The SNA must not be organized to engage in regular business of any kind ordinarily carried on in for-profit organizations. That is, an association that primarily engages in ordinary commercial activities will not be entitled to an exemption simply because it fails to make any money.
  - While the IRS will keep a copy of the determination letter, it is best to keep a copy in the association's records and file an additional copy with the Office of the Secretary of State in your state.
  - In order to protect your state SNA’s tax-exempt status, the association must be committed to satisfying the requirements listed above that enabled them to receive this status.
Meeting the IRS Tax Requirement for Small Nonprofits

Under the Pension Protection Act of 2006, most small tax-exempt organizations whose gross receipts are normally $50,000 or less must file Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ*. Before this law was enacted, these small organizations were not required to file annually with the IRS. The first filings were due in 2008 for tax years ending on or after December 31, 2007.

**Due Date of the e-Postcard**

The *e-Postcard* is due every year by the 15th day of the 5th month after the close of your tax year. For example, if your tax year ended on December 31, the *e-Postcard* is due May 15 of the following year. If the due date falls on a Saturday, Sunday, or legal holiday, the due date is the next business day. **You cannot file the e-Postcard until after your tax year ends.**

For more information on these instructions on compliance, please cut and paste the following URLs to visit the IRS website: [http://www.irs.gov/Charities-&-Non-Profits](http://www.irs.gov/Charities-&-Non-Profits)
Chapter 6:
Awards & Scholarships
SNA Member Awards

SNA celebrates and honors members who work every day to ensure well-nourished students across the country are prepared for success. Encourage your members to participate in the SNA Awards Program to be recognized for the amazing contributions they make every day.

SNA provides awards to recognize every member type, including the:
- Employee of the Year Award
- Manager of the Year Award, in honor of Louise Sublette
- Director of the Year Award

All individuals must be nominated by peers, staff, colleagues, or supervisors for these awards. All nominees must be current SNA members in the correct membership category who are current hold a SNA Certificate in School Nutrition or the SNS-credential throughout the entire awards process. Self-nominations will not be accepted.

For each award, the nomination form may be submitted online to SNA headquarters or directly to the State President by March 1 of each year. Nominations submitted online will be forwarded to the respective State President within 3 business days of the respective state’s deadline.

All state, regional, and national award winners are recognized annually at the Awards Ceremony at SNA’s Annual National Conference and receive prizes from SNA to honor their service.

SNA award winners are recognized at the Red Carpet Awards Ceremony at SNA’s Annual National Conference (ANC) each year. Award winners will receive the following prizes:
- State winners will receive a certificate and ribbon.
- Regional winners will receive a pin, certificate, and $50.
- National winners will receive a plaque and an all-expenses paid trip to ANC, worth up to $1,000.

Specific requirements and judging criteria can be found at www.schoolnutrition.org/SNAawards.
State Association Timeline for SNA Awards

State leaders play a major role in the success of the SNA Awards Program in their state association by:

- Educating members about the awards
- Promoting participation in the awards program to members
- Facilitating the judging process for state awards
- Celebrating and recognizing award winners at state meetings and in state publications
- Coordinating with SNA to ensure that state winners are selected in time to be eligible to win regional and national awards and be recognized at SNA’s Annual National Conference

Below is a timeline and checklist to help you and your state association promote, facilitate, and coordinate the SNA Awards Program. In many states, the Membership Chair acts as the lead for this program. In some states, there is an Awards Chair or Committee.

September-December:
- Begin promoting the awards in your newsletters, on your website, at your state conference. Reach out to SNA for promotional copy and handouts you can use.

January:
- Promote the awards program in email blasts to targeted audiences, on your website, in your state newsletter, at your state conference, at chapter meetings, and by word of mouth.
- Brainstorm ideas about who could potentially act as a judge on your panel.

February:
- Promote the awards program in email blasts to targeted audiences, on your website, in your state newsletter, at your state conference, at chapter meetings, and by word of mouth.
- As nominations come in, be sure to check that the nominee meets the basic requirements.
- Reach out to potential judges and ask them to be a part of your judging panel.

March:
- All nomination forms are due online or to the State President by March 1.
- Once you receive the nomination forms, be sure to check that the nominee meets the basic requirements.
- Nominations submitted online will be forwarded to the respective State President within 3 business days of the respective state’s deadline.
- Share your state’s submissions for Employee, Manager and Director of the Year Awards with judges to determine a winner.
• **All state winners must be determined and submitted to SNA headquarters by March 15.**

April:
• Notify the winners of the state awards by sending an official letter from the State President and by having a state board member call the state winners to congratulate them.
• Notify all nominees who did not win by sending an official letter from the State President thanking them for their service to school nutrition and SNA.
• **All regional winners will be determined by April 5.**

May-June:
• **All national winners will be determined by May 1.**
• Publicly congratulate your state (and regional/national) winners in your state newsletter and on your website.

July:
• All state, regional, and national winners are recognized at the awards ceremony at SNA’s Annual National Conference. All state presidents from the previous year are also recognized at this event.
SNA Member Awards:  
State Judging Guidance

The State Association President (or their designee) is charged with the responsibility of facilitating the awards judging process for the SNA Member Awards, specifically the:

- Employee of the Year
- Manager of the Year, in honor of Louise Sublette
- Director of the Year

Below are the deadlines for the judging process for all member awards, as well as guidance to help you navigate this process successfully.

<table>
<thead>
<tr>
<th>Deadline:</th>
<th>Action:</th>
<th>By Whom:</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 1, 2017*</td>
<td>Award nomination forms submitted online or to State President</td>
<td>SNA Members</td>
</tr>
</tbody>
</table>
| April 5, 2017     | Regional Winners Determined and sent to SNA HQ                           | Employee: SNA Regional Director and Panel of Judges  
                     Manager: SNA Regional Director and Panel of Judges  
                     Director: SNA Membership Committee Regional Representatives |
| May 1, 2017       | National Winners Determined and sent to SNA HQ                           | Employee: SNA Section Chairs  
                     Manager: SNA Regional Directors  
                     Director: SNA Membership Committee |

*Please notify SNA if your state deadline differs from March 1.
Below are step-by-step instructions to help you navigate the judging process:

1. Select a panel of judges.
State Presidents are advised to appoint a panel of at least 3 individuals to judge the Employee, Manager, and Director of the Year awards each year, between March 1 and March 15.

Different states create panels and select judges in different ways. Here are some options to consider:

- Create a panel of Past Presidents to judge the awards
- Create a panel of Chapter Presidents to judge the awards
- Designate a separate Awards Chair and Committee to judge awards, especially if your state offers its own awards and scholarships
- Designate the Membership Chair and Committee to judge awards
- Designate the Professional Development Chair and Committee to judge awards
- Ask for volunteers from the state board and state committees to help judge

State Presidents, Board Members, Chapter Leaders and others may participate in the judging process as a panelist, so long as no conflicts of interest exist. Potential conflicts of interest include:

- Judge being from the same school or district as a nominee
- Judge being the supervisor of a nominee
- Judge being related to a nominee
- Judge having nominated someone for the award they are judging
- Judge being nominated for the award they are judging

To avoid conflicts of interests, State Presidents should be mindful of who they ask to judge. State Presidents can also assign numbers to nominees and submit the nominations redacted to the judging panel, so that judges will be scoring the nominees anonymously.

2. Judges review and score nominations.
After the deadline has passed and you have received the nominations submitted directly to you and the nominations submitted online to SNA headquarters (in early March), share the nominations with your judges and ask them to use the Official Judging Forms to score each nomination.

Here are some tips for the Chair to facilitate the process:

- Don’t include the nominations for those who don’t qualify.
  - This includes non-members, those who don’t hold a SNA Certificate or SNS Credential, or those who are members in the wrong section for that award.
  - This also includes nomination forms that are not typed or do not meet the word count maximum requirements.
  - If you need help determining if an individual is qualified, contact StateSupport@schoolnutrition.org.
- Share the nomination forms and official judging forms electronically or as hard copies.
  - Judging can be done completely remotely!
- All judging forms can be found online in the Awards Toolkit at www.schoolnutrition.org/AwardsToolkit
• Give your judges a deadline to return completed official judging forms to you.
  o Remember- you’ll need to have a winner selected and submitted to SNA headquarters by March 15.
• Plan a conference call ahead of time to regroup with the panel to determine a winner or to announce the winner to the group, based on the scores.

Here are some tips for judges on judging the candidates:

• Encourage judges to review and score one section of the form at a time, rather than reading and scoring each nomination in full.
  o For example, for the Employee of the Year Award, encourage your judges to read and score Section 1: Customer Service Skills for every nomination. Then, move on to read and score Section 2: Creativity for every nomination, and so on.
  o This will help judges compare the nominations as you go and stay consistent in judging.
• Remind your judges to remain consistent.
  o Some judges will be “tougher” graders than others- and that’s to be expected!
  o As long as each judge stays true to their scoring system throughout the judging, you shouldn’t run into any problems.
• Judge each example provided individually.
  o Judge on the facts provided. The more information given which proves the individual’s merit, the better!
  o Vague responses should receive less credit than responses with concrete examples.

Below is a summary of the available points for each category in each award:

Employee of the Year Award
The categories and points assigned to each category are as follows:
Section 1: Customer Service Skills .................................................................30
Section 2: Creativity ..................................................................................20
Section 3: Commitment to Professional Development ..........................20
Section 4: Dedication to the School Nutrition Profession ....................30
Total Possible Points..............................................................................100

Manager of the Year Award, in Honor of Louise Sublette
The categories and points assigned to each category are as follows:
Section 1: Cafeteria Environment ...............................................................30
Section 2: Management and Staff Development ..................................30
Section 3: SNA Involvement ....................................................................20
Section 4: School and Community Outreach ..........................................20
Total Possible Points..............................................................................100

Director of the Year Award
The categories and points assigned to each category are as follows:
Section 1: Program Enhancement ...............................................................30
Section 2: Staff Development .................................................................20
Section 3: School Involvement .................................................................15
Section 4: SNA Involvement .................................................................20
Section 4: Community Outreach ............................................................15
Total Possible Points..............................................................................100
3. Combine Scores to Determine a Winner!
Once your judges have had time to review and score the candidates, it is time to collect and combine the scores to determine a winner!

Here are some tips for the Chair to facilitate the process:

- Welcome questions throughout the judging process from your judges. If one judge is unsure, others may be, too.
- Send a reminder email/phone calls to judges a couple days before the deadline to submit their scores.
- Set a deadline for your judges to submit their Official Judging Forms to you.
- Combine scores on the Composite Scoring Form and share the results with your judges. The nominee with the highest overall score should be your winner.
- Consider facilitating a discussion with the judges to go over results and confirm the state winner. This can be done via conference call or in-person. You can even send an email to confirm the state winner, if you and your judges are strapped for time.

4. Submit the names and nomination forms of the state winners to SNA Headquarters by March 15 for regional judging.

Here are some tips for the State President (or designee) to facilitate the process:

- Your state association may select one Employee of the Year, one Manager of the Year, and one Director of the Year winner each year.
- If your state submits a nominee who is not qualified for the award, SNA headquarters staff will either work with you and the winner to ensure qualifications are met OR you will be given the option to submit a new winner.
- Winners who do not qualify for the award will not be recognized by SNA.

5. Notify State Winners and Other Nominees of the State Association’s Decision

Here are some tips for the State President (or designee) to facilitate the process:

- The State President should call the winner of each award to congratulate them. Let the winners know:
  - They will be recognized on stage and receive prizes from SNA at the Red Carpet Awards Ceremony at SNA’s 2016 Annual National Conference in San Antonio, Texas
  - Any state recognition they can expect
- Notify all other nominees who were not selected as winners via email or a letter from the President
  - Congratulate nominees on being nominated
  - Thank nominees for their contributions

Check out the State Support Center!
Find all of the judging forms you need at www.schoolnutrition.org/AwardsToolkit
Recognizing Your State SNA Award Winners

The SNA awards program is a great opportunity to highlight the outstanding and important work of SNA members! The SNA awards program has been revamped and now awards have easy-to-understand names, new prizes, streamlined rules and online forms for easy nominating! All SNA state, regional, and national winners are honored at the Awards Ceremony at SNA’s Annual National Conference. State winners can and should also be recognized by you - the state association. Below are ideas to help you recognize your winners at the state and local level.

At the State Conference
Your annual state conference is the perfect place to publicly thank and congratulate your state award winners! Below are a few ways to leverage your state conference to recognize your winners.

- Highlight winners in your program: Dedicate a page of your state conference program or booklet to showcase the winners. List their name, job title, and school district and a quote from their nomination or from the winner. Be sure to include a picture of the winner, if possible, and utilize the state award logos, available from SNA.
- Recognize winners at the general session: Do you have a couple minutes to spare at a general session? Bring your award winners up on stage for the praise and thanks they deserve! Use the state awards videos available from SNA to give the celebration a professional look. Take a look at the winning nomination forms and quote a few words about each winner to show why they won. Consider giving a bouquet of flowers or some other memento to each winner and definitely take a picture. You can use the pictures on your website and social media and in future publications.
- Host an awards ceremony: An awards ceremony is a great way to highlight your Employee, Manager, and Director of the Year, along with winners of other state-specific awards. Use the state awards videos available from SNA to give the celebration a professional look and be sure to take photos you can use in the future. Utilize the template presentation available from SNA to show the names of the winners as they are announced. Encourage members to wear business casual to give the ceremony a more meaningful feel or use your conference theme to make it a fun and cheerful event!
- Hold a President’s Reception: Consider hosting a President's Reception-in which the board, award winners, and other special guests can gather together for a special event, some food, and fun.

At Local Chapter Meetings
Not only can state winners be recognized at the state and national level- they can be recognized at home, too!

- Send a board member to recognize the winner: Ask for a few moments at an upcoming local chapter board meeting. Along with other updates from the state and national association, the board member can personally thank and congratulate the winner.
- Encourage chapter leaders to congratulate the winner publicly: Can’t make it out to a chapter meeting? Call up the winner’s chapter president and let them know the good news! Encourage the chapter leader to congratulate the winner in the chapter newsletter, on the chapter website, and at the next chapter meeting.
**Offer Special State Prizes**

While all state SNA award winners do receive a special certificate and recognition at SNA's Annual National Conference, this can be just the beginning. Consider adding another prize to the state award to encourage participation in the awards and give back to a deserving and engaged SNA member of your state. Here are a few ideas:

- **State Conference Registration and Travel Costs:** Consider giving your state award winners a free trip and registration to your annual state conference! Not only will you be sure that you can recognize the winner in person, but you'll be promoting the SNA awards and getting at least one- if not more- state conference attendee in the process. Good will grows and your membership will be happy to see you giving back to a member!

- **Logofied Prizes:** Use the newly-created state award logos to create a special gift for your winners! A pin, plaque, or even a tote bag would be a great addition to the prize and something special to provide from your state association.

- **Other prizes:** Survey your members and ask what they'd like to receive as a reward for earning an award! Giving an additional prize that they've selected could be a great incentive to get more participants in the SNA Awards Program.

**Online and in State Publications**

Congratulate your winners whenever you can! Winning an award is a big deal and something to celebrate. Consider making an announcement of the winners and then profiling each winner separately. Include pictures from the awards ceremony at ANC (always available for download on the SNA Flickr Page after the event) or your state conference celebration and utilize templates available through SNA. Here are some places you can celebrate your winners:

- In your state newsletter or magazine
- On your state Facebook page
- On your state website
- Via a press release

**Showcase YOUR state association's awards, too!**

Success breeds success. If your state association wins a membership or professional development award, share the good news with your members! Highlight the awards and thank your members for their part in the win through your state conference, publications, and website.

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**Check out the State Support Center!**

Find the state award logos, videos, certificates and more at [www.schoolnutrition.org/AwardsToolkit](http://www.schoolnutrition.org/AwardsToolkit).
President’s Award of Achievement

Each year SNA honors all state presidents through the President’s Award of Achievement, in Honor of Thelma Flanagan. SNA recognizes the commitment and dedication individuals who act that State President make to SNA, school nutrition, and the children SNA members serve every day.

Do State Presidents Need to Apply to Win?
State Presidents must submit a SNA State Association Plan of Action Form to SNA Headquarters by December 15 of each year. The form may be submitted to SNA online or via email to StateSupport@schoolnutrition.org. State Presidents may use the form provided by SNA or may submit the plan in their own format.

How will State Presidents Be Recognized?
State Presidents will be recognized for their year of service to SNA and the state association by receiving a framed certificate at the SNA Awards Ceremony at SNA’s Annual National Conference.

What are potential State Initiatives to Undertake to ensure a successful year?
As a state leader, you will find ample opportunity to enhance your leadership skills throughout the Annual Plan. Each state can design an energized plan that empowers members to be involved and supports SNA’s Strategic Plan, resulting in stronger school nutrition programs across the country. Consider SNA’s strategic goals as you plan your year ahead:

- Strategic Goal I: Education & Professional Development
- Strategic Goal II: Advocacy and Public Image
- Strategic Goal III: Community
- Strategic Goal IV: Infrastructure
President’s Award of Excellence

The President’s Award of Excellence recognizes three state presidents each year who demonstrate extraordinary leadership by successfully implementing strategies that advance school nutrition programs in their states and who made the extra effort in achieving excellence in each of SNA’s five Strategic Pillars.

In order to provide equal opportunity for states of different sizes, the President’s Award of Excellence is awarded to one state president in each of the three member divisions:

- 1-500 Member Division
- 501-1000 Member Division
- 1001+ Member Division

**How can state presidents apply for this award?**

State Presidents will automatically be entered to win the President’s Award of Excellence by completing and submitting the Year-End Report to SNA by May 31 of each year.

**How will the applicants be judged?**

The applications (Year-End Reports) will be judged at SNA Headquarters using the following criteria:

I. Excellence in Education & Professional Development (25% of score)

- Meet or exceed a 2% increase in certification
- Meet or exceed a 2% increase in credentialing
- Offer professional development training in state to support members with the Healthy, Hunger-Free Kids Act implementation.

II. Excellence in Advocacy & Public Image (25% of score)

Demonstrate one successful initiative implemented during the year that resulted in enhancing the public image of school nutrition programs.

III. Excellence in Community (25% of score)

Demonstrate one successful initiative implemented during the year that resulted in expanding the state’s community outreach in order to further school nutrition programs.

IV. Excellence in Infrastructure (25% of score)
• Meet or exceed a 5% increase in membership
• Achieve a retention rate of 85% or higher
• Demonstrate successful participation in the SNA Membership Drives

Numerical goals (for the SNA Certificate Program, credentialing, and membership) will be determined by SNA Headquarters at the beginning of each membership year. State Presidents will be judged at SNA Headquarters to determine winners.

The President’s Award of Excellence will be given to the state which best meets the above criteria from each membership division.

**How will the winners be recognized?**
The three President’s Award of Excellence winners will be announced at the Opening General Session at SNA’s Annual National Conference. The winners will each be given a special medallion to commemorate this accomplishment.
Membership Awards for State Associations

Each year, SNA recognizes state associations for increasing membership, attaining the membership goals determined by SNA, and achieving the greatest increase in membership amongst state associations.

**Increasing Membership Award**
Each state which increases its membership over the previous May 31 year end numbers will be awarded $2 per every increase in members to a maximum of $200. The Increasing Membership Award is only given to states which increased membership but did not meet the requirements for the Membership Goal or Member Division Champion Awards.

Certificates will be awarded to the State President at the Red Carpet Awards Ceremony at SNA’s Annual National Conference (ANC). Cash prizes will be mailed as checks to the state association after ANC.

**Membership Goal Award**
Each state which meets its membership goal for the year (as determined by SNA headquarters) will be awarded $300. Membership Goal Award winners are not eligible to win the Increasing Membership Award.

**Membership Division Champions**
This award is given to the two state associations in each member division which have increased membership over the past year by the largest number of members and the largest percentage of members.

Division membership will be based on May 31 membership numbers of the previous year. The divisions are as follows:
- 1 to 500 members
- 501 to 1,000 members
- 1,001+ members

In the event that a single state has the largest number increase and the largest percentage increase in a division, the state in that division having the second largest percentage increase will receive the second award. Each Member Division Champion winner will be awarded $500. Member Division Champions are not eligible to win the Membership Goal or Increasing Membership Awards.

**How are membership award winners determined?**
The SNA Marketing and Membership Center determines which states are eligible to win membership awards. Membership awards are based on the increase in membership from the May 31 Membership, Certification and Credentialing Report (2016) from the prior year to the May 31 Membership, Certification and Credentialing Report of the current year (2017).
Professional Development Awards for State Associations

Each year, SNA recognizes state associations attaining SNA certificate program goals and achieving the highest increase in SNS credentialing.

Certificate Program Goal Award
Each state which meets its certificate program participation goal for the year (as determined by SNA headquarters) will be awarded $50.

Credentialing Division Champions
The state association in each member division which has increased the number of SNS-credited individuals in the state by the largest number over the past year will be awarded $100.

In the event that multiple states in a division are tied, the state with the largest percentage increase will receive the award for the division.

How are membership award winners determined?
Certification and credentialing awards are based on the increase in certification and credentialing from the May 31 Membership, Certification and Credentialing Report from the previous year (2016) to the May 31 Membership, Certification and Credentialing Report of the current year (2017).
Connecting Members to SNF Scholarships

For over 30 years, the School Nutrition Foundation (SNF) has been raising funds to provide SNA members the opportunity to achieve their higher education goals through a wide variety of scholarships. To date, SNF has awarded members over $2 million in scholarships.

Scholarships and grants are available through the School Nutrition Foundation for active SNA members, including:

- Scholarships to achieve your educational dreams
- Scholarships to attend national SNA conferences (such as Annual National Conference and Legislative Action Conference)
- Grants to upgrade school kitchen equipment

Applications to apply for SNF scholarships open in January of each year. Deadlines vary, depending on the scholarship. Please check [www.schoolnutrition.org/scholarships](http://www.schoolnutrition.org/scholarships) for more information about specific scholarships available to members and to access the application forms.

State leaders should promote the scholarship programs to SNA members within the states. SNF scholarships are only available to SNA members and this is a great perk of being a member. Updates you can use will be provided to state leaders via email and in SNAC Bites.

Specific scholarships and grants vary from year-to-year, based on available funding.

Check out the State Support Center!
You’ll find a flyer and website banner ads to connect your members with scholarship opportunities.
Chapter 7:
Supporting Local Chapters
Supporting Local Chapters

When SNA chapters are thriving and sustainable organizations, they provide members with opportunities to:

- network with other school nutrition professionals in their area
- work through shared challenges
- celebrate successes
- learn together in a friendly and professional environment
- connect with and promote school nutrition to their community in a positive way
- have fun with their peers

In state associations with local chapters, state leaders can- and should -play a role in supporting local chapters to be thriving, sustainable organizations which add value to SNA for SNA members in your state. Supporting local chapters can come in many forms and still be successful. Supporting your local chapters not only helps your local chapters, but it helps your state association and our national association- by engaging members and creating a pool of leaders to grow in the association.

Here are just a few ideas to help you and your state board in supporting your local chapters.

Coaching Local Chapter Leaders

Coaching local chapter leaders in leadership, membership, and other issues can be a great way to show support and make leaders feel welcome and connected to your state association. Coaching can simply be checking in via a phone call each month to the local chapter president and chatting with him/her for a half hour. Coaching calls should focus on how the local chapter president can bring about positive change in themselves and their local chapter and help them reach their goals for the local chapter. Coaches can act as the lifeline between the state association and the local chapters and can communicate issues to the state association from the local chapters you might not hear about otherwise.

Does your state board have regional representatives? Consider adding coaching local chapter leaders to the job description of the regional representative. If you don’t have regional representatives, think about other individuals who could help- can each board member take on one local chapter? Are there past leaders in the state who want to stay connected with SNA but who are not currently on the board?

Coaching usually works best when the coaches develop a personal relationship with the coachee, and utilizing the use of open-ended questions can help coachees navigate issues for themselves. Here are a few sample open-ended questions a coach could use:

- What are your strengths as a chapter leader?
- How can you maximize your strengths during the next year as a chapter leader?
- What are your weaknesses as a chapter leader?
- How can you work on your weaknesses?
- What are your goals?
Attending Local Chapter Meetings
Having state board members (especially the state president) attend local chapter meetings on a regular basis can be a great way to show local chapter members that they are part of a larger organization. At local chapter meetings, you and your state board can:
- Install new local chapter board
- Provide statewide updates from SNA
- Train on a topic of expertise
- Ask for feedback from local chapter members
- Promote upcoming SNA state and national opportunities (including events, webinars, and programs)
As President, consider creating a plan to visit all local chapters in your state during your term. If you are in a large state or this isn’t feasible, consider asking other board members or regional representatives to make themselves available. Make a goal to reach every local chapter at least once each year as a state board.

Holding Regional Meetings for Local Chapters
Hosting regional meetings to connect local chapters to each other and provide a close-to-home professional development opportunity can provide a sense of belonging and showcase the benefits of SNA membership. SNA of Virginia hosts one “mini-meeting” per year in each region. The “mini-meeting” is hosted by the regional representative on the state board, who plans, promotes and implements the meeting with help from local chapter leaders. Each “mini-meeting” is sponsored by industry, who provide food and help cover the costs.

At a regional meeting, you can:
- Provide needed training to local members
- Raise funds for the state association through registration fees
- Invite nonmembers (who pay a higher nonmember rate) and encourage them to join
- Showcase the value of SNA membership and programs
- Get a great local speaker to energize members
- Ask for feedback from local chapter members

Recognizing Outstanding Local Chapters and Leaders
Many state associations recognize the accomplishments of local chapter and leaders through awards programs and recognition at the state conference. Consider implementing the following recognition programs in your state:
- Give Chapter President Awards to Chapter Presidents who achieve and excel at implementing statewide goals in the SNA Strategic Goals. Hand out the awards at your state conference.
- Hold a breakfast, banquet, or other gathering at your state conference just for Chapter Presidents as a thank you for their service and a networking opportunity.
• Call a Parade of Chapters at a state conference general session. Ask each State President to share their biggest accomplishment for the year and ask everyone to show some chapter pride. Have some fun with the idea by giving the parade a theme.

**Moving Local Leaders up the Leadership Ladder**

Encourage local leaders to become active state and national SNA members and leaders. Here are a few ideas for your state to undertake:

• Mentor local leaders by pairing them up with a current state board member to shadow or by asking them to attend a board meeting. This will help them feel like they are a part of a larger organization and encourage them to participate at the state level.
• Ask local leaders to join a state committee. This is a great first step towards leadership at the state and national levels.
• Hold a State Leadership Conference to teach local chapter presidents and rising leaders about the Association, opportunities available to them, and leadership skills they can use in the chapter and on the job.
• Hold a Regional Leadership Conference with other state associations in your SNA region. Speak with your SNA Regional Director and the State Affiliate Relations Manager for ideas on how to get started.

**Connect Local Chapters to SNA Programs and Member Benefits**

SNA has a lot to offer our members— but it’s only meaningful if members are engaged and knowledgeable about how to take advantage of these benefits! The state association is the main link between SNA national programs and local chapters. Here is how you can connect local chapter to SNA programs:

• Forward the monthly *SNAC Bites* newsletter on to local chapter presidents for distribution at chapter meetings. Be sure to highlight items that are especially important for your state and chapter.
• Encourage chapter leaders to check out the great resources available just for them from SNA at [www.schoolnutrition.org/chapters101](http://www.schoolnutrition.org/chapters101). There, chapter leaders will find a **Chapter Leaders Handbook**, along with sample bylaws, sample financial sheets, and more.
• Promote the Talk Tuesday and Webinar Wednesday webinar series to your chapters. Talk Tuesdays are held on Tuesdays at 2pm and connect members to benefits. Webinar Wednesdays are held on Wednesdays at 2pm and provide SNA members with an opportunity to learn school nutrition hot topics and earn a CEU credit. All webinars are recorded and make great chapter meeting opportunities. Find out more at [www.schoolnutrition.org/webinars](http://www.schoolnutrition.org/webinars).
• Help chapters showcase other member benefits by promoting SNA program such as the STEPS program, Star Club, SNA Awards and more. Ideas and tools are available on the thumb-drive and at [www.schoolnutrition.org/stateresources](http://www.schoolnutrition.org/stateresources).
Check out the State Support Center!
At www.schoolnutrition.org/chapters101, you’ll find sample chapter materials shared by other state associations.
Chapter 8:
Organizing Your Files
Organizing Your Files

The list below explains how to organize your association's files. Many association leaders responsible for the administrative functions of the state association are inundated with paperwork, and oftentimes it can be a bit confusing trying to figure out what information goes where.

There are a number of different ways to file documents. The list below offers one successful method to organizing your association documents. Be sure to share the necessary documents with your board members.

I. Documentation
   A. Bylaws (state and SNA)
   B. Incorporation Materials (Articles of incorporation, proof of tax-exempt status)
   C. Board of Director's materials (Board Policy Manual, copies of Board of Directors meeting minutes)
   D. Contracts/Policies (Insurance policies, lease agreements, contracts)

II. Finances
   A. Financial Reports (Annual, quarterly, monthly financial reports; budgets)
   B. Tax Forms (IRS Form 990)
   C. Bank Statements

III. Operations
   A. Contact information (Board of Directors, Committee Chairs, SNA National Headquarters contact information)
   B. Policies and Procedures
   C. Change of Status forms

IV. Records
   A. Membership and Certification Rosters
   B. Membership and Certification Records
   C. Meeting Minutes

Each person organizes files to fit their needs. However, you should always keep your files organized so anyone in your association can find all of the pertinent information to make your association operate smoothly.