

GEO CHAPTER TOOLKIT

A guide to managing and growing local
GEO communities and events

Last updated: June 2024



INSIDE THIS GUIDE

- **ABOUT GEO AND CHAPTERS**
 - [GEO's mission and member benefits](#)
 - [What is a GEO Chapter?](#)
 - [Your GEO contacts](#)
 - [Chapter structure](#)
 - [Roles and responsibilities](#)
 - [GEO supporting resources](#)
 - [Chapter sponsorship](#)
- **EVENTS**
 - [Event management](#)
 - [Who can attend?](#)
 - [Tracking attendance](#)
 - [Content curation](#)
 - [Promoting events, timelines and marketing resources](#)
 - [Offering CPE Credits](#)
- **ONLINE ENGAGEMENT**
 - [GEOconnect](#)
 - [LinkedIn](#)
- **[METRICS AND REPORTING](#)**



ABOUT GEO

GEO is committed to providing the opportunity for employees around the globe to share in the wealth they help create.



- [Annual conferences](#)
- [Regional events](#)
- [Chapter meetings](#)
- [Webcasts](#)
- [GEOlearn](#)
- [News and insights](#)
- [Career center](#)
- [GEO Awards](#)
- [Newsletter updates](#)
- [Survey/research findings](#)
- [GEOconnect](#)
- [Chapter communities](#)
- [Member directory](#)
- [GEO Fellows](#)
- [GEO councils](#)



- Founded in 1999
- GEO Awards founded 2001
- GEO Fellows founded 2017



- Lawyers/Attorneys
- Stock plan designers/administrators
- Trustees
- Accountants, brokers
- Client/account managers
- HR practitioners and consultants
- Academics/government agencies



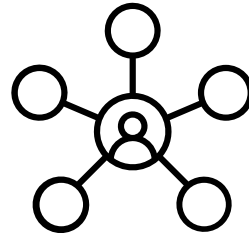
- GEO is governed by an elected Board of Directors
- Multi-disciplinary industry leaders
- Global representation



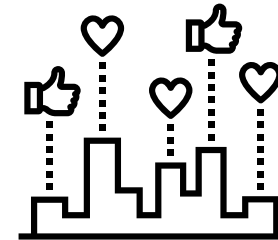
GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

- +5,000 members
- +60 countries
- Exclusive insights and resources
- Virtual, chapter and global events
- Fellows and awards recognition
- Member discounts

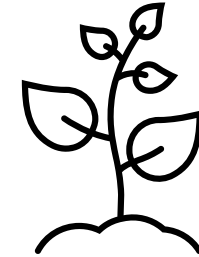
CHAPTERS SUPPORT THE GROWTH OF GEO'S GLOBAL MEMBERSHIP BASE, ATTRACTING EXPERTISE AND EXTENDING CONNECTIONS FOR THE BENEFIT OF ALL GLOBAL MEMBERS



NETWORK.



SHARE.



GROW.

A critical component of GEO's infrastructure

- **Increase participation** - Provide a local connection to issuers, providers, academics, decision-makers, and colleagues in local communities, worldwide.
- **Advocate and encourage** - Represent GEO in their local areas.
- **Income generation** - Achieve mutual success and grow GEO membership and participation, contributing to GEO's revenue where possible.
- **Brand protection** - Protect the GEO brand and member/participants' personally identifiable information.

WHAT IS A GEO CHAPTER?

LOCAL CHAPTERS PROVIDE LOCAL CONNECTION TO GEO MEMBERS IN COMMUNITIES AROUND THE WORLD

YOUR GEO CONTACTS



GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

Mary is the primary liaison between local Chapter leadership teams and GEO and is your first point of contact

PRIMARY CHAPTER CONTACTS

- [Gabbi Stopp](#) – Chapter strategy and sponsorship
- [Mary Potter](#) – Membership and systems management

OTHER GEO TEAM MEMBERS

- [Michele Holly](#) - Operations
- [Kate Scorer](#) – Content and digital
- [Kaitlyn Hallman](#) – Marketing and social media



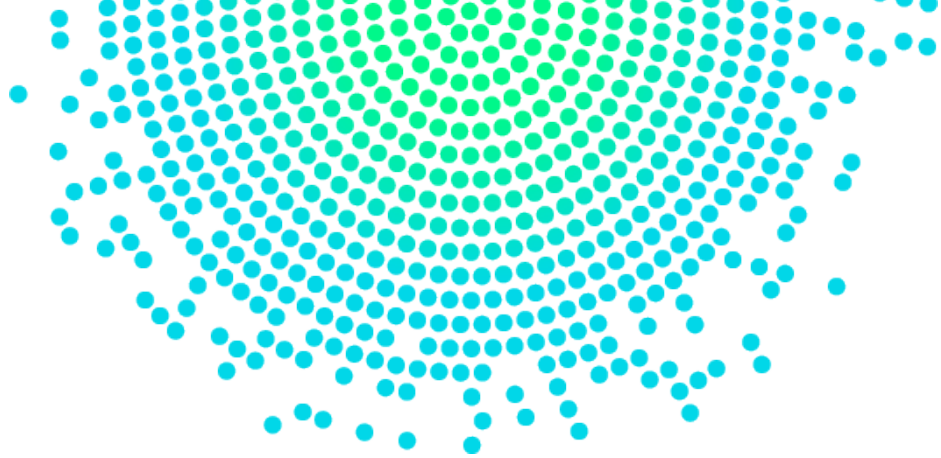
The Chapter Development Committee (CDC) provides general governance and guidance to Chapters, helping to align the Chapter activity with GEO strategy

CHAPTER DEVELOPMENT COMMITTEE LEADERS

- Leann Balbona – Chair
- Julie Vanderveen – Co-chair

BOARD LIAISONS

- Boston - Maria Robins
- DACH - Marc Muntermann
- France - June Davenport
- Greater China - Adie Leung
- Netherlands - Tara Hagen
- New York - Maria Robins
- NorCal - Tara Hagen
- Spain - June Davenport
- Swiss Romandie - Marc Muntermann
- Sydney/Melbourne - June Davenport
- Texas - Danyle Anderson
- Toronto - June Davenport
- UK and Channel Islands - Hannah Needle



CHAPTER STRUCTURE AND RESPONSIBILITIES



CHAPTER STRUCTURE

STRUCTURE GUIDANCE

- GEO does not define how the Chapters are structured - structure is at the sole discretion of the local Chapter Leadership Team.
- Whilst a formal 'structure' is not required, GEO encourages each Chapter to establish a leadership team/committee of local members to drive Chapter membership and engagement.
- When planning the structure of your Chapter as well as planning Chapter activities, the two main drivers of Chapter attendance are **compelling educational sessions** and **networking opportunities**.

CHAPTER LEADERSHIP TEAM RECOMMENDATIONS

- Must be **GEO members** (three recommended)
- Include issuer and provider members
- Designate one leader as a point of contact or a team of leaders
 - choose the structure best suited to the local environment



CHAPTER RESPONSIBILITIES



CHAPTER LEADERSHIP TEAM

Responsible for the day-to-day operations of the local Chapter including:

- Collaborate with GEO team on logistics
- Decide Chapter structure
- Schedule meetings and identify meeting locations
- Identify relevant topics and presenters
- Promote Chapter events via [GEOconnect](#) and follow up with prospective members
- Engage local members via [GEOconnect](#)
- Report attendance and statistics back to GEO
- Post Chapter presentations/materials on [GEOconnect](#)
- Posting content and events on Chapter LinkedIn page



GEO TEAM

Responsible for supporting the Chapter Leadership Team including:

- Updating the GEO website with Chapter events
- Creating registration pages
- Creating email and distributing to local members and prospects
- Provide weekly registration reports to Chapter leader
- Providing marketing collateral and assets to ensure consistent brand application
- Editing event titles and descriptions in line with GEO's tone of voice
- Follow-up with Chapter after meeting to get overall summary and attendance list



GEO BOARD LIAISONS

Responsible for strategic support and goal setting for the local Chapter including:

- Provide strategic support to 1 to 4 Chapters
- Provide guidance and alignment of local Chapter to GEO strategy
- Support Chapter with local events
- Liaise with GEO Board to help drive attendance to events

GEO SUPPORTING RESOURCES

GEO PROVIDES THE NECESSARY
DIRECTION, SUPPORT AND
RESOURCES TO HELP CHAPTERS
SUCCEED



BRANDING

All promotions must be branded by GEO
– [contact us](#) for
branded materials



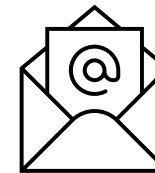
WEBSITE

Chapter page
updates



GEOconnect

Access requests,
training, platform
support



EMAIL PROMOTIONS

Save the dates,
invitations,
announcements



LINKEDIN

Chapter page build,
access requests, post
graphics



ADVISORY

Surveys, fundraising,
event guidance, inter-
chapter liaison

Decisions such as Chapter structure, meeting frequency, meeting type, logistics and agenda are the responsibility of each local Chapter Leadership Team.

It is the responsibility of the local Chapter Leaders to communicate and collaborate with GEO in order to achieve mutual success.

CHAPTER SPONSORSHIP

- **Sponsors of Chapters and Provider speakers at Chapter events must be members of GEO.**
- Chapter Leaders may secure ad hoc financial or logistical support to cover individual meetings from meeting hosts, presenters or other local sources.
- In addition, Chapter Leaders may form a relationship with local Service Providers to sponsor the Chapter. While providing financial or logistical support, the sponsoring Service Provider receives marketing consideration and recognition at local events.
- Annual Chapter sponsorship fees are typically \$1,000-\$3,500 per year. Sponsorship fees are remitted directly to GEO.
- Generally, 80% of all sponsorship revenue is reserved for use by the local Chapter and 20% covers GEO's administrative overhead costs.
- Some Service Providers approach GEO requesting to pay bundled pricing. If a Service Provider in your region wishes to utilize this approach, it is highly recommended to coordinate sponsorship discussions with [Gabbi Stopp](#).
- Contact the local Chapter Leadership team or [Gabbi](#) for further information.

GEO, at its discretion, may provide funding for new or recently established Chapters, but securing adequate levels of financial support is primarily the responsibility of the local Chapter Leadership Team.



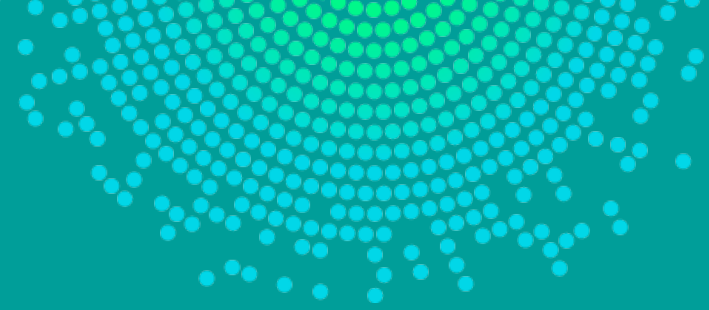
CHAPTER EVENTS

How to plan, execute and measure successful events



HOSTING CHAPTER EVENTS

- **Number of events** – Ideally 3 events annually
- **Type of event** – All educational and social events are encouraged! Webcasts should feature local content. Global content should be made available to the whole GEO community via GEO's webcast program
- **Scheduling** – Check with the GEO team to ensure no conflicts with central events
- **Lead time** - Announce 8-10 weeks prior to the event and PROMOTE! (Contact GEO for branded promotional assets)
- **Board Liaison** - Leverage them when planning events (invitation content review, request to board members to help drive attendance to your event, non-membership outreach)
- **Sponsorship** - Rotate sponsorship or provide group sponsorship if ½ day event or longer
- **Location** - Try to host in a neutral location (issuer or external event site). Rotate locations around town (e.g., useful in cities like Houston, London)
- **Presentation topics** - Consider having more than one topic to help draw more attendees. Provide good content descriptions to pique interest. Feature regional content for webcasts, pass global topic opportunities to GEO. **Note: Only GEO Member Providers are permitted to speak at Chapter events**
- **Continuing education credits** – Notify GEO before including CEP and CPE (US only) credits - CPE requires certain procedures.



WHO CAN ATTEND?

Chapters must note the following requirement when considering attendees:

- **Non-member Issuers** may attend **two meetings at no cost** without registering for GEO membership. This approach provides local Chapters the opportunity to grow by introducing any non-member Issuers to GEO’s member offerings at the event.
- **Service Providers** are encouraged to be registered GEO members to attend local Chapter meetings.

SUGGESTED ATTENDEE CHARGES

ATTENDEE TYPE	RECOMMENDED CHARGE
GEO members	No charge
GEO non-members	Two free events, then \$85

- **The Chapter Leadership Team** should ensure that accurate records of attendees to local Chapter events are maintained and shared with GEO via the template Excel spreadsheet provided.

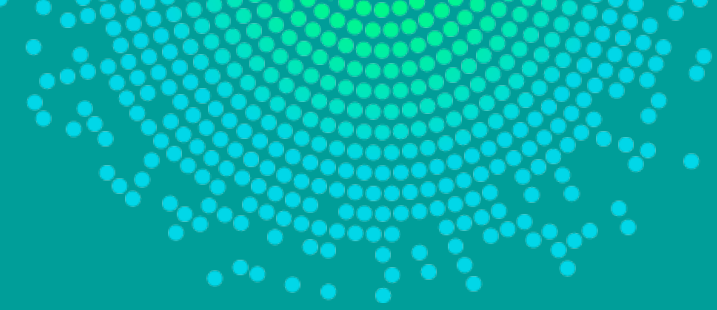
NOTE: These requirements may be waived in the event of meetings held jointly with similar local professional organizations (e.g., CEP, NASPP, ProShare).

TRACKING ATTENDANCE

- Mary Potter will send a final registration list before the meeting. You will use this final list to track attendance
- Ensure all attendees sign in or are checked in. Manually add walk-in attendees. Please email spreadsheet back, or if you had write-ins, please scan and email scanned sheet to Mary
- CEP is automatic - please reference the [CEPI](#) for reporting requirements
- For CPE credits – **please refer to GEO for further information and approval before offering credits.** NASBA has strict conditions which must be met, including but not limited to:
 - The presentation materials must be reviewed by a CPA qualified person at least one week prior to the meeting
 - There must be at least three engagement questions
 - All attendees requiring CPE credit must use sign-in sheets with time in and out and their attendance must be monitored for excessive breaks, etc.
 - Attendee check-in sheets and CPE sign-in/out sheets must be shared with Mary Potter

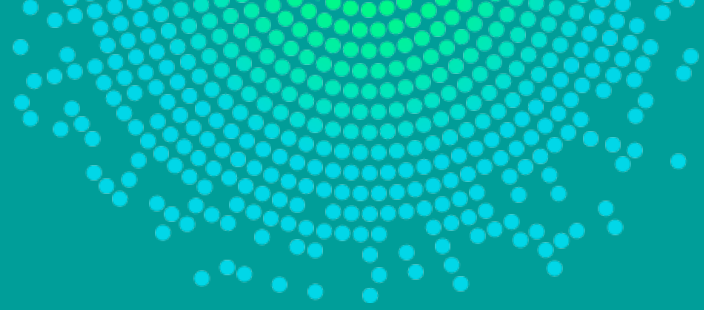


EVENT CONTENT



- **Branding** – Use GEO branded presentation decks. Visit the [Chapter Resources](#) page on the GEO website to access the latest version of the slide deck and to request GEO branded promotional assets
 - Note: The deck contains introduction to GEO slides that may change, so check for updates just before your event.
 - Remember: Add in any presenter company logos, copyrights, or disclaimers as needed.
- **Save time for drawings** – Prize drawing can be held at end of event
 - **Gifts/giveaways** – Encourage sponsors and/or speakers to provide company branded small gifts (e.g., pens, company goods, etc.)
 - **Conference fee drawing** – Chapter Leadership should confirm with the GEO team if a complimentary conference registration can be given away. Only issuers are eligible for this drawing to help encourage GEO participation and membership
- **Get feedback** – Liaise with the GEO team to build a survey, include polls at your event or print feedback forms. Share the learnings with the GEO team so that we can improve future events. [Contact Mary](#) for further details.
- **Name tags** - Utilize name tags with bees or some other color designation to show that the person is not a member or a “newbee” at the Chapter event. Encourage Chapter leadership to make a point of meeting and greeting newbees at the event and brokering introductions to other GEO members.

RECOMMENDED TIMELINES



10 weeks

8 weeks

6 weeks

4 weeks

2 weeks

1 week

- Secure logistics: date, location, topic, description and speakers. If CPE is being granted, see document for procedure
- Request branded promotional assets from GEO (Kaitlyn Hallman)
- Send event logistics to GEO to update chapter website, create registration and design invitation (Mary Potter)

- Chapter leadership reviews invitation
- GEO provides registration report weekly
- Chapter leadership posts event to GEOconnect and Chapter LinkedIn pages
- When approved, GEO posts event details on GEO website, opens online registration, emails invitation, & posts on GEO's social

- Chapter Leadership continues to promote event across your clients, colleague base, social media, GEOconnect and Chapter LinkedIn page
- GEO continues to promote event to members and contacts via email and social
- Review registration list

- Download GEO Chapter PPT template from [Chapter Resources](#)
- GEO and Leadership continue to promote the event, same channels as 6 weeks out promotion channels
- Review registration list

- GEO and Leadership continue to promote the event, same channels as 6 weeks out promotion channels
- Review registration list
- Chapter leadership makes phone calls to local clients and colleagues not registered

- Chapter leadership confirms venue logistics
- Chapter leadership reviews agenda and presentation details with speakers
- Ensure GEO Chapter PPT template is current
- GEO provides attendee list to leadership for name tags, security clearance, and food service

PROMOTE EVENT



SAMPLE AGENDA

MORNING SESSION

- **8:30 – 9:00** - Registration & networking breakfast
- **9:00 – 9:10** - Introductions & GEO update
- **9:10 – 10:10** - Topic 1
- **10:20 – 11:20** - Topic 2

Close with an overview of upcoming GEO Chapter and global events

AFTERNOON SESSION

- **15:00 – 15:30** - Registration & tea/coffee
- **15:30 – 15:45** - Introductions & opening remarks
- **15:45 – 16:45** - Topic 1
- **16:50 – 17:50** - Topic 2
- **17:50 – 18:15** - Closing remarks and GEO update

Close with an overview of upcoming GEO Chapter and global events and networking drinks

NOTES:

For US CPE sessions must be at least 50 minutes in length for credit.

Notify the GEO team if you intend to offer CPE credits to ensure a compliant process.



INVITATIONS AND PROMOTION

- Please **do not** rebrand GEO branded collateral – all Chapter promotions must be GEO branded.
- GEO will create artwork for **online invitations, pull-up banners, email signature banners** and **social post graphics** for your event
- GEO is also able to send a short and customized **Local Chapter Preferences Survey** to gauge local contacts pulse regarding meeting logistics, length, etc. such as:
 - Days of week
 - Time of day
 - Topics
 - Willingness to host or speak, etc.
- This information is helpful for both new and relaunched Chapters

GE **CANADA CHAPTER TORONTO**
NETWORKING EVENTS

HOME | COMMUNITY | INSIGHTS | LEARN | JOIN GEO

COMPENSATION CLAWBACKS CATCH-UP AND EQUITY - KEEPING IT REAL AND RELEVANT TODAY

14 JUNE 2023 | 4:00-5:30PM (ET) | IN-PERSON

TOPICS:
COMPENSATION CLAWBACKS CATCH-UP: NAVIGATING NEW RULES WITH URGENCY
Compensation clawback rules are becoming increasingly stringent, impacting companies listed on U.S. stock exchanges. This session will provide vital insights into the new U.S. securities rules and stock exchange requirements that mandate the adoption of executive incentive compensation clawback policies. We will explore the implications, challenges, and urgent actions Canadian companies listed on U.S. stock exchanges must take to ensure compliance and avoid potential delisting.

LOCATION:
Delta
22 Adelaide Street West
Toronto
M5H 0A9

PRICE:
There is no cost for this chapter meeting.
Both GEO members and non-members are welcome.
Registration is required.

EQUITY - KEEPING IT REAL AND RELEVANT TODAY
In a landscape characterized by high inflation, economic uncertainty, intensified climate and regulatory risks, and facilitating employee turnover, the appeal of share ownership has diminished. Moreover, employees, influenced by market conditions and the availability of alternative compensation options, may undervalue the potential benefits of equity incentives compared to cash awards. This session aims to explore effective approaches to ensure that equity programs deliver their intended retention and incentive benefits in today's dynamic environment.

REGISTER NOW

GE
GLOBAL EQUITY ORGANIZATION

1442 East Lincoln Avenue, 4th Fl
Chicago, IL 60614

GE **EUROPEAN CHAPTER UK AND CHANNEL ISLANDS**
NETWORKING EVENTS

WELCOME

EUROPEAN CHAPTER NORDIC DENMARK, FINLAND, NORWAY, SWEDEN

STRIVING FOR SIMPLICITY: APPLYING PAST LEARNINGS TO BUILD A BETTER FUTURE
7 JUNE 2023 | 8 - 9:30AM | VIRTUAL

REGISTER

EUROPEAN CHAPTER NETHERLANDS

LINKING THE NEW OPTION REGIME WITH PERSONAL FINANCIAL FITNESS
25 MAY 2023 | 14:30 - 19:00pm | AMSTERDAM

REGISTER

TIPS FOR MAXIMUM ENGAGEMENT

- **Timing of day** – Select time of day best for your market. Consider varying breakfast, ½ day or afternoon in larger markets (e.g., London, New York) and try to avoid overlap with other trade organizations or local events.
- **Networking** – ½ hour should be reserved. In some markets we have used holiday themes or matching games to encourage new introductions between attendees. Afternoon sessions may end with networking drinks.
- **Topics** – Vary topics at event so there is a good mix of topics at the event with robust descriptions.
- **Branded promotional assets** – Please complete the online form on the [Chapter Resources page](#). All in-event, social graphics, online and email invitations are created by GEO, including ‘Save the Date’ emails.
- **Engage on GEOconnect** – All GEO members are automatically added as members on their regional GEOconnect Chapter page. Use the discussion board to engage local members – see the [GEOconnect section](#) of this pack for more information.

EVENT PROMOTION

- **Share the invite** with the Chapter Leadership Team and your Board Liaison for redistribution to their contacts and relevant board committees
- **Repackage the email content** to send out from your organization to your clients and colleagues.
- **Send reminders** “Come see me speak...” ([contact GEO](#) for social media post graphics)
- **Distribute invitations** to your issuer friends and clients
- **Conduct personal outreach** by email and phone
- **Use Social Media and reshare** via the Chapter LinkedIn page, plus Instagram, Twitter and Facebook
- **Promote via [GEOconnect](#)** In the open forum and on the community Chapter page



MARKETING RESOURCES

REQUEST MARKETING COLLATERAL VIA THE [CHAPTER RESOURCES PAGE](#)

To finalize the marketing assets for your event, we require the following information:

- Title and description of the session/event
- Date and time of the event
- Speakers' names and company
- Location of the event
- Agenda (if applicable)
- Fees (if applicable)
- Sponsor's Logo (if applicable)

By providing the above details, we can ensure that the marketing assets for your event are comprehensive, informative, and effectively promote its key features and benefits.



A screenshot of the event page on the GEO website. At the top is the GEO logo and 'EUROPEAN CHAPTER NETHERLANDS NETWORKING EVENTS'. Below is a navigation bar with links: HOME | COMMUNITY | INSIGHTS | LEARN | JOIN GEO. The main heading is 'LINKING THE NEW OPTION REGIME WITH PERSONAL FINANCIAL FITNESS'. Below that, it lists speakers: NAVJEET ROSENTHAL-GILL, FAI CHEUNG, AND CORIEN DIETERMAN FROM PWC, with the date and time: 25 MAY 2023 | 14.30 - 19.00 | AMSTERDAM. The page is divided into sections: 'A look at new tax rules in the Netherlands and the importance of equity in the broader well-being of employees' (with a 'LOCATION' box for PWC, Westgate 2 Building, Thomas R. Mathusstraat, 1066 JR Amsterdam), 'AGENDA' (listing times from 14.30 to 19.00), and 'FEES' (stating there is no cost). A 'REGISTER TODAY' button is visible. At the bottom, there are two photos: one of a group of people and one of a presentation slide. The GEO logo and tagline 'GLOBAL EQUITY ORGANIZATION the future of global employee compensation' are at the very bottom.

DATA PRIVACY AND PROTECTION

While lists of local members, including contact details, are provided to local Chapter Leaders, they are **not** to be shared with anyone beyond the Chapter Leadership Team, nor are they to be used for any purpose other than the promotion of local Chapter events.

Chapter Leaders are required to sign an NDA before GEO provides them with access to GEOconnect to any personal information that may be visible. [Contact Mary to request an NDA.](#)

Any member of a local Chapter Leadership Team found violating the above guidelines will be immediately removed from the Chapter's Leadership Team, may have their GEO membership revoked and may attract litigation.



PARTNERING WITH OTHER TRADE GROUPS

- **Notify relevant Board Liaison and GEO Team** about these opportunities to confirm alignment of approach with GEO (e.g., CEP, NASPP, ProShare etc.)
- **Ask for air-time** at the end of the other trade group event to announce upcoming GEO events
- **Ask to provide handouts** of invitations or membership brochures



EVENT DAY AND POST-EVENT ACTIONS

- **TAKE PICTURES!** - GEO is looking for you to report back on events with both stats and pictures
- **Track attendance** – Use the registration list provided by Mary, sort by alpha last name for attendee sign-in or assign a designee to check-in at the event entrance
 - Ensure all attendees sign in or are checked in. Manually add walk-in attendees (name, company, email)
 - CEP is automatic if the session - please reference the CEPI for reporting requirements
 - US CPE is granted from GEO if the attached CPE guidelines have been met. If the session is eligible, request a CPE sign-in sheet from Mary that must be used during your event.
 - Send attendee check-in sheet and CPE sign-in sheet to Mary
- **Report stats back to GEO** – Send your Excel check-in sheet indicating attendees, no shows and walk ups, along with number of issuer attendees to Mary
- **Post in GEOconnect** – Share with other Chapters and those unable to attend
- **Confirm with speakers** they are comfortable with posting presentations to GEO website and GEOconnect chapter page in a PDF format



SOURCING TOPICS AND CONTENT

- Consult GEOconnect, Board Liaison, or Chapter Subcommittee contacts
- Speak to a GEO team member to discover what GEO members want to hear about
- Access the following online GEO resources:
 - **GEOlearn**
<https://geo-learn.elevate.commpartners.com/>
 - **GEO Insights**
<https://www.globalequity.org/insights>

Use the **GEOconnect Chapter Leaders section**

- Reach out to other Chapter Leaders
- Find out what has been well received and what hasn't



CPE CREDITS

Please [contact GEO](#) before offering CPE credits for your event for information and approval.

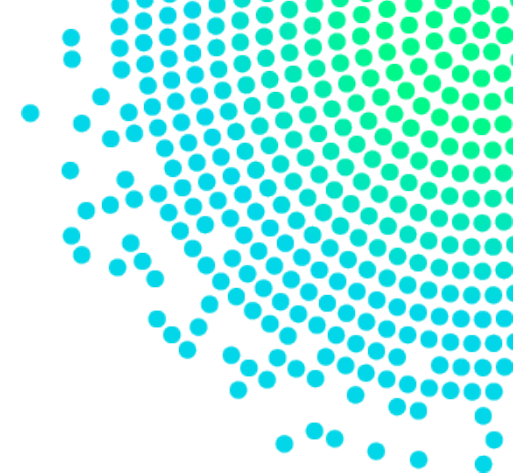
- CPE is not available for online meetings
- There are strict NASBA guidelines that must be adhered to, including:
 - The presentation materials must be reviewed by a CPA qualified person at least one week prior to the meeting
 - There must be at least three engagement questions
 - All attendees requiring CPE credit must use sign-in sheets with time in and out and their attendance must be monitored for excessive breaks, etc.
 - Attendee check-in sheets and CPE sign-in/out sheets must be shared with [Mary Potter](#)





ONLINE ENGAGEMENT

Building your local
audience via GEO's
online platforms



GEOconnect

Use GEO's community platform to engage and grow your local Chapter

- Add and promote your Chapter events
- Promote engagement through discussion threads
- Share event documents, pictures and thought leadership content
- Contact members assigned to a Chapter
- Generate smart newsletters with local content and event information
- Access data and reporting



GEOconnect

BEFORE YOU START

Chapter Events are key to promoting engagement, education, and networking with professionals. Adding chapter events to your community is another tool to get the word out about your chapter activity.

A few things to keep in mind:

SIGN AN NON-DISCLOSURE AGREEMENT (NDA)

- We ask that all chapter leaders have a signed NDA on file before community admin access is granted.
- Once we have received your signed NDA, we will be able to grant access.
- If you do not have community admin access, and you believe that you have a signed NDA on file please contact Mary Potter at mary.potter@globalequity.org.

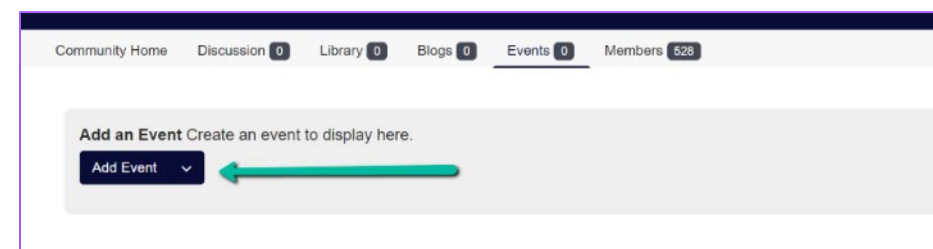
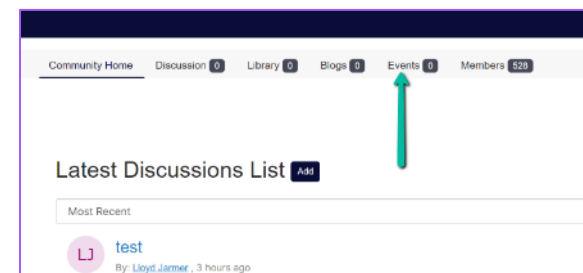
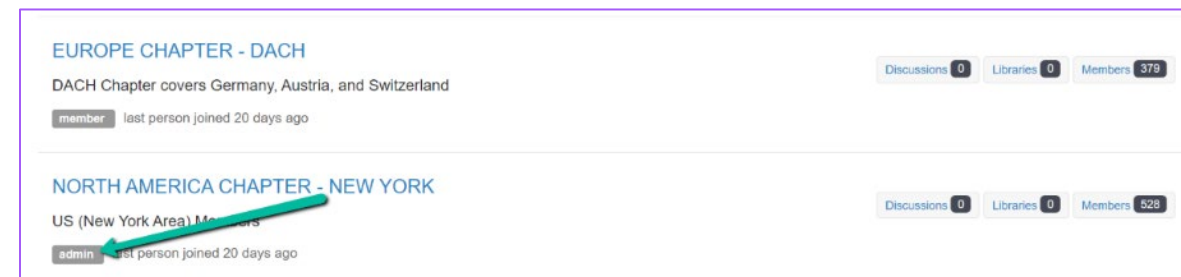
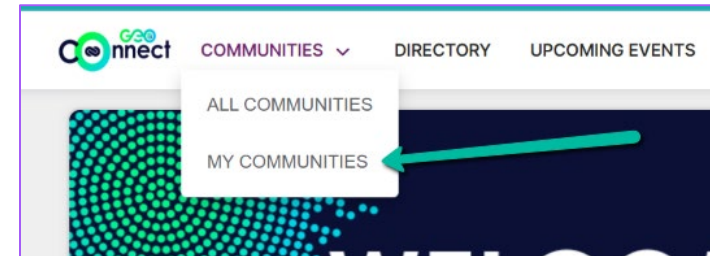
VISIT THE CHAPTER RESOURCES PAGE

- The chapter event should first be submitted via the [GEO Chapter Resources](#) page.
- Please post only GEO-related activities and events.
- The GEO team will review events on chapter pages to ensure they meet GEO standards.



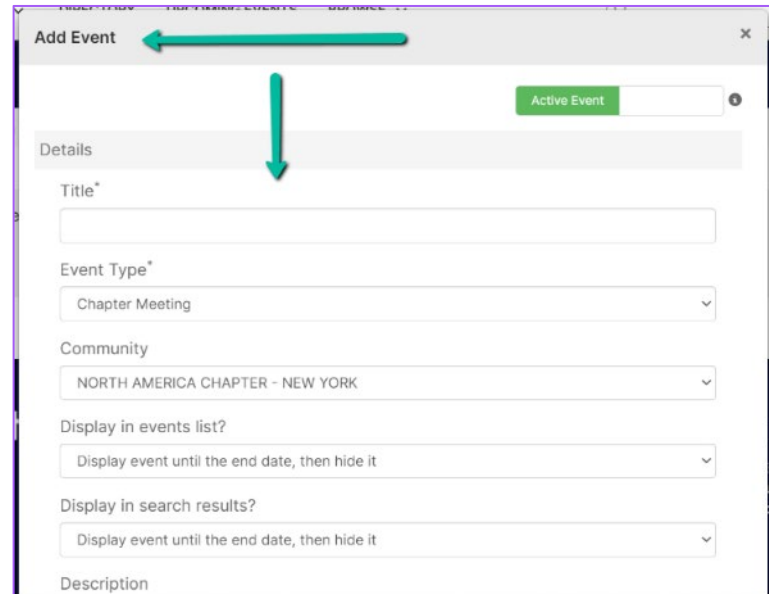
ADDING A CHAPTER EVENT

- Click on Communities in the top navigation menu
- Click on My Communities
- Choose the Community that you are an admin for
- Click on Events
- Click on Add Event



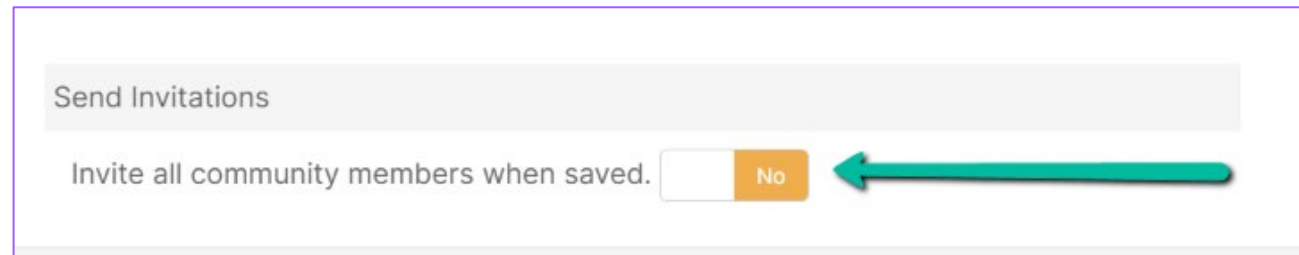
ADDING A CHAPTER EVENT CONTINUED

- Complete the event information ([contact Mary](#) for the meeting description, registration link and graphics).
- Choose whether you want to inform your chapter members
- Click Save



The screenshot shows the 'Add Event' form with the 'Details' section expanded. A green arrow points to the 'Active Event' toggle, and another green arrow points down to the 'Title*' input field. The form includes the following fields:

- Title***: Text input field.
- Event Type***: Dropdown menu with 'Chapter Meeting' selected.
- Community**: Dropdown menu with 'NORTH AMERICA CHAPTER - NEW YORK' selected.
- Display in events list?**: Dropdown menu with 'Display event until the end date, then hide it' selected.
- Display in search results?**: Dropdown menu with 'Display event until the end date, then hide it' selected.
- Description**: Text area (partially visible).



The screenshot shows the 'Send Invitations' section of the form. A green arrow points to the 'No' button in the toggle switch.

Send Invitations

Invite all community members when saved. **No**

GEOconnect

BUILDING AN ENGAGED COMMUNITY

DISCUSSION THREADS

GEOconnect's discussion threads offer a great ways to build an engaged community.

- Discussions should be industry related, professional, and relevant
- Try events, questions, surveys and polls, or links to interesting articles to get the conversation started
- You can post to any of the communities that you belong to and you can cross post to other communities that you have access to.

EMAILING CHAPTER MEMBERS

You can reach out to chapter members individually or to the whole group. GEO has assigned chapters to our active GEO members in accordance with their geographical location.

- **Group Email (emailing whole community)** - Choose the community your admin for >Settings>Email Community Members
- **Individual Email** - Choose the community your admin for>Members>Choose Person>Send Message

MEMBER NOTIFICATIONS

Members can set push notification preferences

To set your communication preferences:

1. From the home page, click [Adjust Your Subscription Setting](#) on the right-hand side
2. Choose the community notifications you would like to adjust
3. Choose from Real Time, Daily Digest, Plain Text or No Email

SMART NEWSLETTERS (COMING SOON IN PHASE 2)

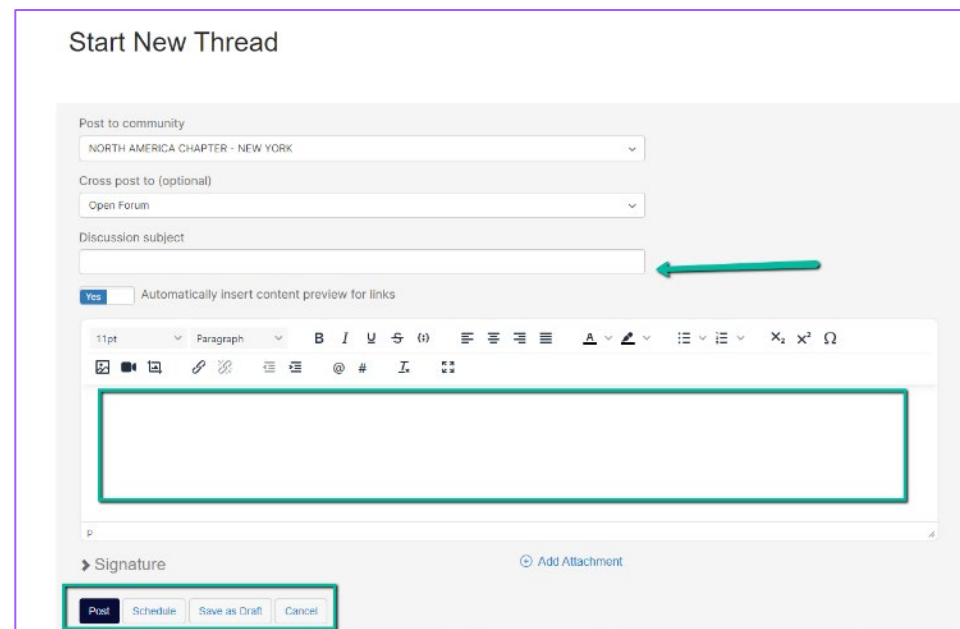
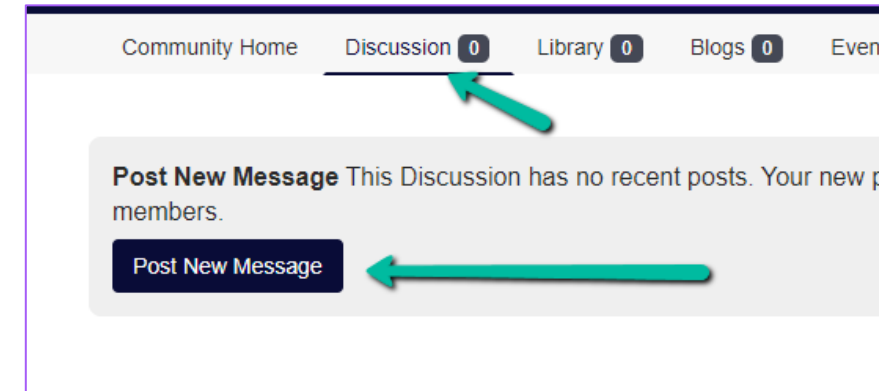
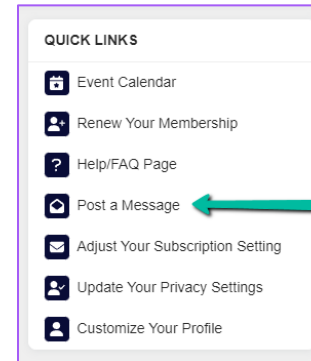
- Generated once a month
- Filters Chapter page content according to the member's interests, including:
 1. New Chapter member profile (if they have a contact photo loaded)
 2. Event information
 3. Recent discussion posts
 4. Recent library entries
 5. Announcements



GEOconnect DISCUSSION THREADS

TO START A DISCUSSION THREAD:

- Click **Post a Message** on your home page or under discussions in your community tab.
- Create your discussion thread
 - Select the community you want to post to and other communities you belong to, and add the subject, and description. You can then choose to post, schedule, save a draft, or cancel it.
 - If you post a thread and change your mind, please [contact Mary](#) to delete it.



GEOconnect

ADDING EVENT ASSETS TO THE LIBRARY

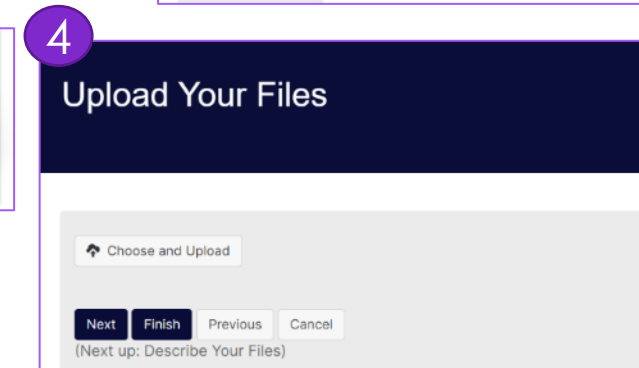
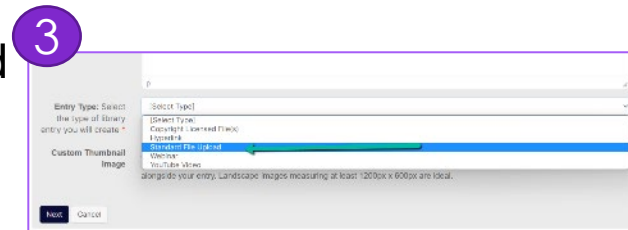
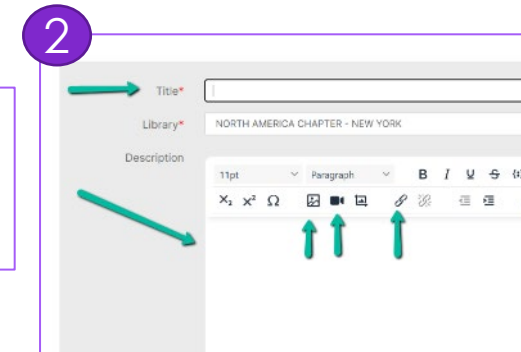
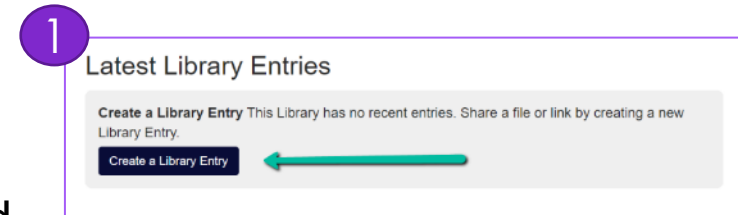
You can use the **LIBRARY** to:

- Share your post-event pictures, presentations and documents
- Promote your chapter event to all the members of your community, even if they may have missed the meeting

Note: Before you post presentations, request permission from the speaker(s)

TO ADD A LIBRARY ENTRY

1. Go to your community, click **Add Library Entry**
2. Use the **Description** box to add your images and description of your chapter meeting
3. Use **Entry Type** to upload your presentation and any other event documents provided
4. Upload your files, and click **Next** to describe or **Finish** to upload and create your entry



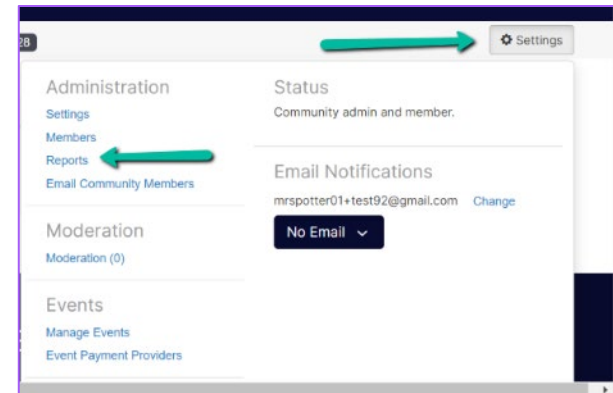
GEOconnect

DATA AND REPORTING

GEOconnect provides access to many helpful reports to our community admins. With these reports you can gauge community engagement by looking at community membership, activity in discussions, and library access.

To access this valuable reporting, follow these steps:

1. Access the community that you are an admin for
2. Click Settings
3. Click Reporting
4. Choose the report that you would like to access and click View Report
5. To export the report, click the blue disk icon above, and choose the format that you would like have the file exported in.



GEOconnect

AVAILABLE REPORTS

AVAILABLE REPORTING

All Discussions Answer Activity

Answered Discussion Activity

Community Member Emails

Community Members Joined and Left

Current Community Members

Discussion Contributors Activity

Discussion Dashboard

Library Contributors

Library Dashboard

Library Entry Access History

Library Entry and File Types

Library Entry Details

Message Origination

Subscriber Activity

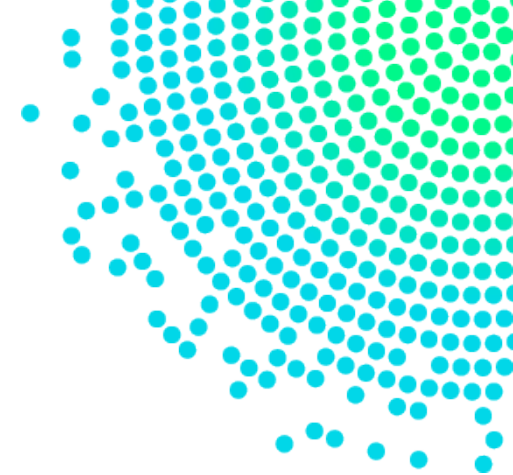
Threads

Total Logins

Unanswered Discussions

Unique Logins





LINKEDIN

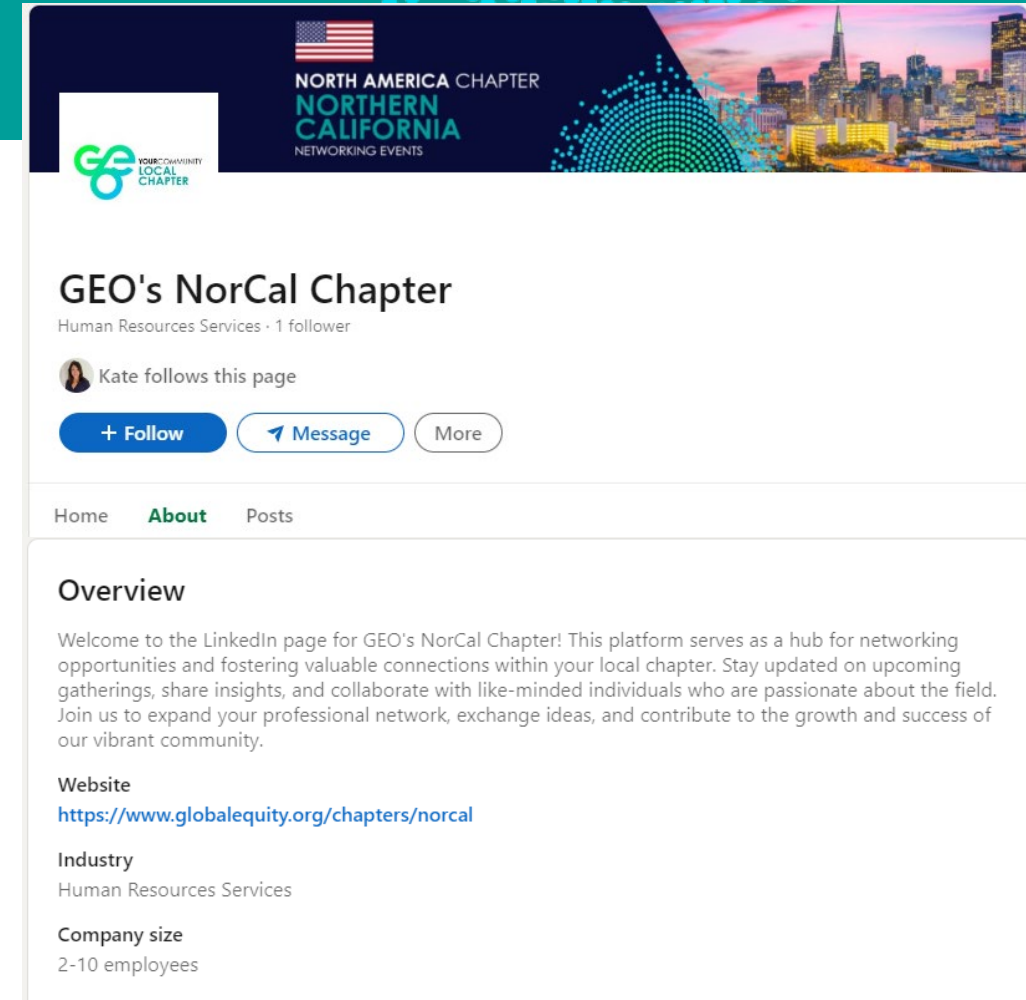
Use GEO's chapter showcase pages to attract new and existing contacts to your network and to promote your events and content.



LINKEDIN

- GEO can establish LinkedIn showcase pages for Chapters that are affiliated with the GEO company page
- Access is granted to Chapter Leaders of the designated Chapters, as well as any support at the Chapter Leaders request. **Please note, all admins of a Chapter showcase page must [complete an NDA](#)**
- Use this page to:
 - Promote your event
 - Create polls
 - Share articles featuring regional updates
 - Post questions to increase member engagement

Contact [Kaitlyn Hallman](#) to request a new Chapter page or be provided with access.



LINKEDIN CHAPTER SHOWCASE PAGES

There are Chapter specific pages established for the following Chapters:

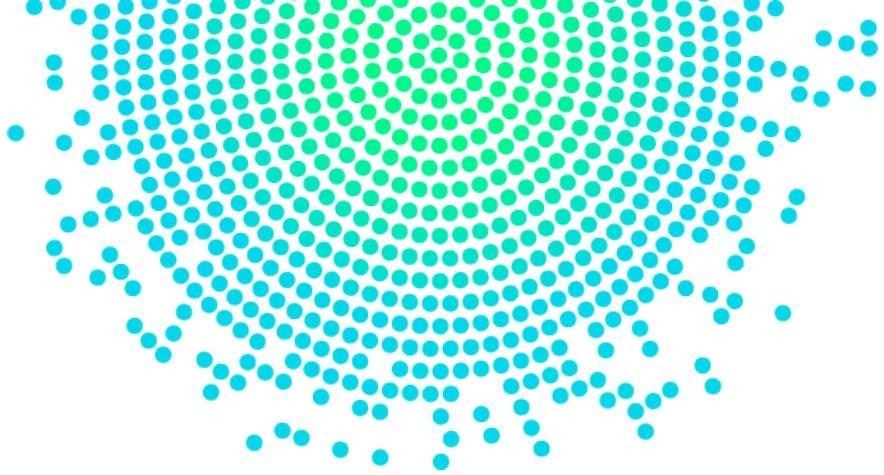
- NorCal
- UK and Channel Islands
- Nordics
- Netherlands
- Toronto

To grow your Chapter showcase page:

- Invite your contacts
- Share posts to your main LinkedIn account while tagging your fellow Chapter Leaders, speakers, etc, to increase your visibility
- GEO will also signpost to your showcase page on our main GEO page while promoting the Chapter events

To have a specific Chapter showcase page created for your chapter, contact [Kaitlyn Hallman](#).





CHAPTER METRICS

Measuring our success, together



CHAPTER METRICS

- **Chapter activity** – number of meetings per year
- **Attendance** – Use **same Excel format** as registration lists to report back to GEO
 - **Non-member attendance** - evaluate trend
 - **Issuer attendance** at meetings
 - **Total attendance** at meetings
- **Presentations and photographs** shared via [GEOconnect](#) and also send to [Mary](#) to post on the chapter webpage
- **Revenue generation** via sponsorships, attendee fees, specialty events and programs



THANK YOU

If you have any further questions, please contact the [GEO team](#) or visit the [CHAPTER RESOURCES PAGE](#)

