GEO CHAPTER TOOLKIT

A guide to managing and growing local GEO communities and events
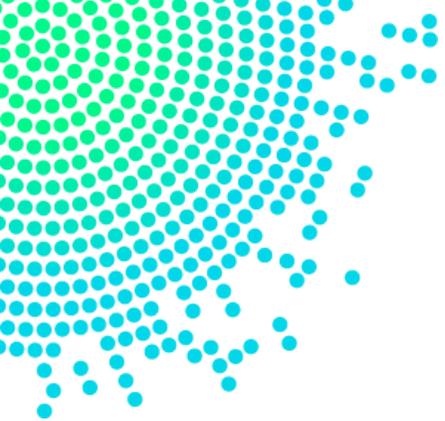
Updated: February 2025

CONTENTS

ABOUT GEO

GEO is committed to supporting opportunities for employees around the globe to share in the wealth they help create through equity ownership.

OUR SERVICES

OUR HISTORY

OUR MEMBERSHIP

OUR GOVERNANCE

- **Annual conferences**
- **Regional events**
- **Chapter meetings**
- **Webcasts**

- **GEOlearn**
- **News and insights**
- **Career center**
- **GEO Awards**
- **Newsletter**
- **Survey/research**

- **GEOconnect**
- **Chapter communities**
- **Member directory**
- **GEO Fellows**
- **GEO councils**

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

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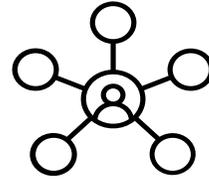- Client/account managers
- Academics/government agencies

- Governed by an elected Board of Directors
- Multi-disciplinary industry leaders
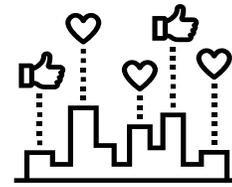- Global representation

GEO

GLOBAL EQUITY ORGANIZATION
the future of global employee compensation

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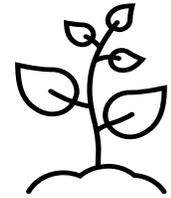- Fellows and awards recognition
- Member discounts

NETWORK.   **SHARE.**   **GROW.**

Chapters are a critical component of GEO's infrastructure:

- **Increasing participation** - Provide local connection to issuers, providers, academics, decision-makers, and colleagues in local communities, worldwide.

- **Advocating and encouraging** - Represent GEO in local areas.

- **Generating income** - Grow GEO membership and participation, contributing to GEO's revenue where possible.

- **Promoting & protecting our brand -** Protect the GEO brand and member/participants' personally identifiable information.

WHAT IS A GEO CHAPTER?

LOCAL CHAPTERS PROVIDE LOCAL CONNECTION TO GEO MEMBERS GLOBALLY

CONTACTS

GLOBAL EQUITY ORGANIZATION

OUR LEADERSHIP
BOARD OF DIRECTORS

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

PRIMARY CHAPTER CONTACTS
- **Gabbi Stopp** – Chapter strategy
- **Zoe Denny** – Chapter sponsorship and memberships
- **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) provide general governance and guidance to Chapters, helping to align the Chapter activity with GEO strategy

CDC LEADERS
Leann Balbona – Chair   Julie Vanderveen & Danyle Anderson – Co-chairs

BOARD LIAISONS
- NY & Boston - Maria Robins
- DACH - Marc Muntermann
- France - June Davenport
- Greater China - Adie Leung
- India – Tara Hagen & Leann Balbona
- Netherlands - Dennis Paalman
- NorCal - Tara Hagen
- Nordics - Zoe Denny
- Spain - June Davenport
- Swiss Romandie - Marc Muntermann
- Texas - Danyle Anderson
- Toronto - June Davenport
- UK & CI - Hannah Needle
- Atlanta – Maya Wright
- Australia – Dheeraj Lalwani
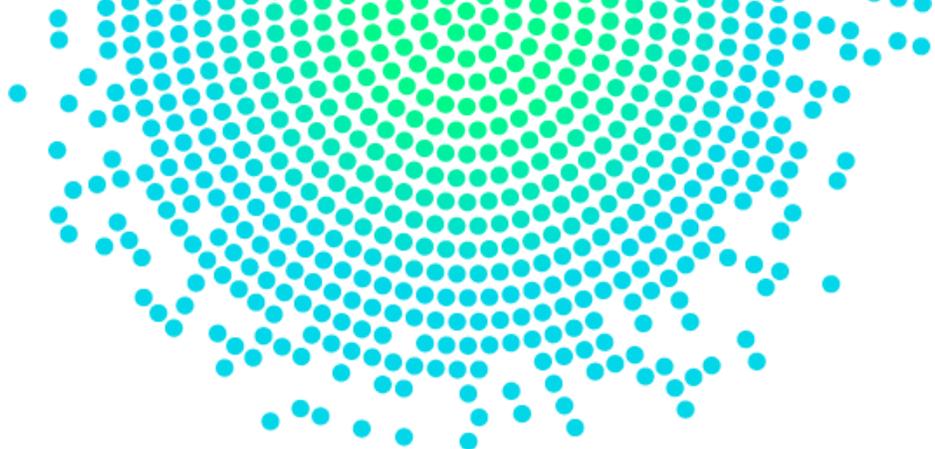
CHAPTER STRUCTURE AND RESPONSIBILITIES

YOUR COMMUNITY
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CHAPTER STRUCTURE

STRUCTURE GUIDANCE

- GEO does not dictate how Chapters are structured - structure is at the 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 content** and **networking opportunities**.

CHAPTER LEADERSHIP TEAM RECOMMENDATIONS

- Minimum of 3
- Must be **GEO members** (include issuer and provider members)
- Designate a leader as a point of contact
- Choose a 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 Chapter LinkedIn page
- Post-event follow up with prospective members
- Report attendance and statistics back to GEO
- Post Chapter presentations/materials photos 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 invitations and distributing to local members and prospects
- Provide weekly registration reports to Chapter lead
- Providing marketing collateral and assets to ensure consistent brand application
- Aligning event titles and descriptions 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

SUPPORTING RESOURCES

GEO PROVIDES DIRECTION, SUPPORT AND RESOURCES TO HELP CHAPTERS SUCCEED

BRANDING

All promotions must be branded by GEO – contact us for branded materials

GEOconnect

Access requests, training, platform support

LINKEDIN

Chapter page build, access requests, post graphics

WEBSITE

Chapter page updates

EMAIL PROMOTION

Save the dates, invitations, announcements

ADVISORY

Surveys, fundraising, event guidance, inter-chapter liaison

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

CHAPTER SPONSORSHIP

- **Sponsors 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.

- Chapter Leaders may form a relationship with local Providers to sponsor the Chapter. While providing financial or logistical support, the sponsoring Service Provider receives marketing consideration and recognition at local events.

- If you're ready to secure sponsorship for your chapter, reach out to us for a **sponsorship fee template**. Sponsorship fees are remitted directly to GEO.

- A portion of sponsorship revenue is reserved for use by the local Chapter.

- Some sponsors may request bundled pricing, contact **Kate Scorer** to discuss and arrange this.

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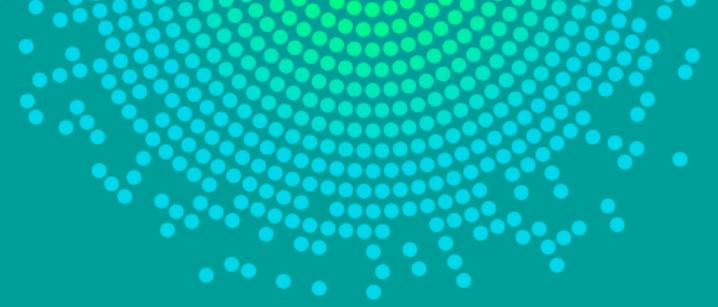
CHAPTER EVENTS

How to plan, execute and measure successful events

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HOSTING CHAPTER EVENTS

- **Frequency** – 2-3 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, also the industry events calendar via Sharepoint

- **Lead time –** GEO Must be informed a minimum of 8 weeks prior to the event to set up assets and registration to promote your event

- **Board Liaison** - Leverage them when planning events (invitation content review, request help drive attendance and non-membership outreach)

- **Sponsorship** - Rotate sponsorship or provide group sponsorships

- **Location** - Try to host in a neutral location (issuer or external event site). Rotate locations

- **Presentation topics** - Consider multiple topics to attract attendees. Provide good content descriptions to pique interest. Feature regional content 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 set procedures.
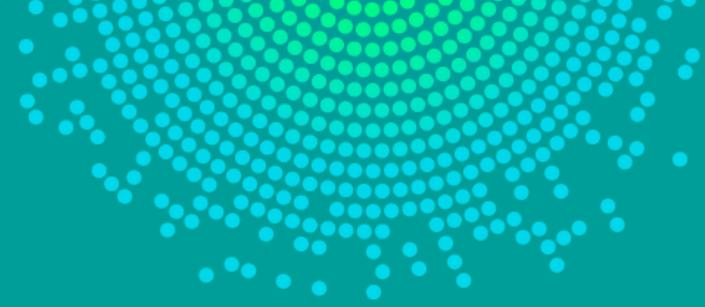
WHO CAN ATTEND?

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 CHARGES

ATTENDEE TYPE	RECOMMENDED CHARGE
Members	No charge
Non-member Providers	Two free events, then **$85***

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

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

*Please contact the GEO team before charging for event attendance so that we can check whether VAT or other charges may apply in the region.

TRACKING ATTENDANCE

Mary Potter will send a final registration list before the meeting. Use this list to track attendance

- Ensure all attendees are signed in. Manually add walk-in attendees.

- Please email a final spreadsheet back to GEO to update our attendee records

- GEO will reach out to non-members after the event to provide more information about the benefits of membership.

CPE (US only)

Please refer to GEO for approval before offering credits. NASBA has strict conditions which must be met, 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 <u>Mary Potter</u>

- Sessions must be at least 50 minutes in length

- CPE is not available for online meetings

- Please reference the <u>CEPI</u> for reporting requirements

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EVENT CONTENT

Branding – Use GEO branded presentation decks. Visit the Chapter Resources on the GEO website to access the latest version of the slide deck and to request GEO branded promotional assets. This is updated regularly so check for updates just before your event. Remember: Add in any presenter company logos, copyrights, or disclaimers as needed.

Save time for draws – Prize draws 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 draws –** Confirm with the GEO team if a complimentary conference registration can be given away. Only issuers are eligible for this draw to 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 leaders to meet and greet newbees and broker introductions to other GEO members.

SOURCING TOPICS AND CONTENT

- Consult **GEOconnect**, Board Liaison, GEO Team Members or Chapter Subcommittee

- 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 to reach out to other chapter leaders to find out what has been well received and what hasn't

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TIMELINE

10 weeks	**8 weeks**	**6 weeks**	**4 weeks**	**2 weeks**	**1 week**

- Secure logistics: date, location, topic, description and speakers ('Save the Date' can be issued whilst details confirmed). If CPE (US only) is being offered, seek approval from GEO

- Request branded promotional assets from GEO

- Send event logistics to GEO to update chapter website, create registration and design invitation

- GEO Sets up registration page, initial Linkedin and GEO Connect

- GEO sends registration, email invitation

- GEO provides registration report weekly

- Chapter leadership to repost and reshare event info to their networks

- GEO and Leadership continue to promote the event – amongst members, contacts and clients via GEOconnect and Chapter LinkedIn page

- Review registration list

- Download GEO Chapter PPT template from Chapter Resources

- GEO and Leadership continue to promote the event

- Review registration list

- GEO and Leadership continue to promote the event

- Chapter leadership personal reach out to local clients and colleagues not registered

- Review registration list

- Chapter leadership confirms final logistic details with venue

- 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 and dietary reqs.

PROMOTE EVENT

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SOURCING TOPICS AND CONTENT

MORNING SESSION

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

AFTERNOON SESSION

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

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

NOTE:

For US CPE sessions must be at least 50 minutes in length for credit. Prior approval from GEO required.

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SETTING UP YOUR CHAPTER EVENT

Once content and date and location are agreed request GEO set up your event.

1) **Visit https://www.globalequity.org/chapters/resources**

2) **Complete the Chapter Event Request Form** with the details of your event. **Remember your event must be at least 8 weeks away – We recommend allowing 9-10 weeks to allow time for promotion and preparation**

3) GEO will:

- Create online event registration
- Create a LinkedIn post and post it to your Linkedin Chapter page and your GEOConnect page (please do like and share with your communities)
- Send an email invite to members and contacts who are located in your region or affiliated with your chapter.

If you require any additional resources, please request them on the form.

CHAPTER RES ✕

https://www.globalequity.org/chapters/resources

WELCOME TO GEO'S CHAPTER RESOURCE HUB

CHAPTER SLIDE DECK   CHAPTER TOOLKIT   CHAPTER EVENT REQUEST FORM
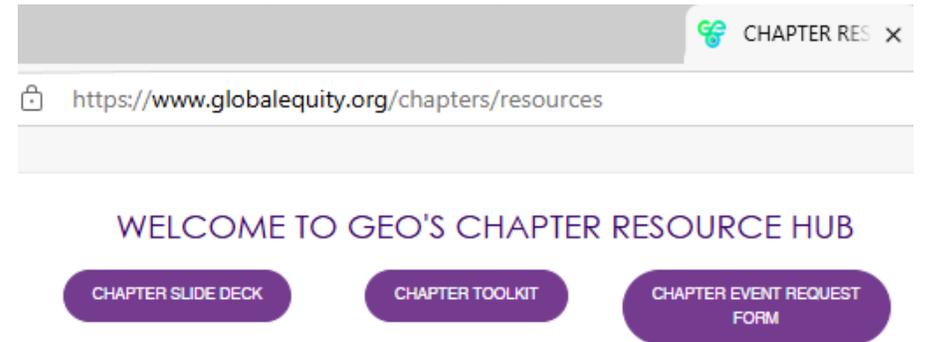
MARKETING RESOURCES

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, we can ensure that the marketing assets for your event are comprehensive, informative, consistently GEO-branded, and effectively promote the benefits of attending

INVITATIONS AND PROMOTION

GEO can create additional resources such as artwork for **online invitations**, **pull-up banners,** and **email signature banners** for your event. **All Chapter promotions must be GEO branded.**

GEO can send a short and customized **Local Chapter Preferences Survey** to gauge opinions on:

- meeting logistics, length, etc.
- Days of week
- Time of day
- Topics
- Willingness to host or speak, etc.
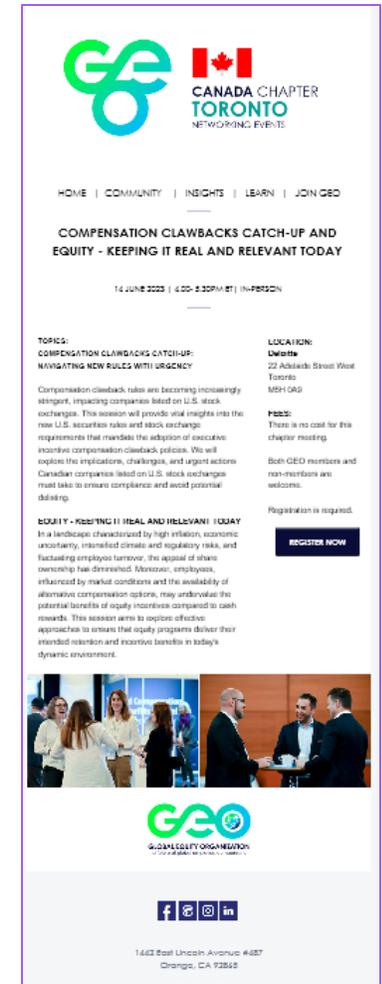
TIPS FOR MAXIMUM ENGAGEMENT

- **Timing –** Select time of day best for your market. Consider varying breakfast, or afternoon events and avoid overlap with other organizations local events.

- **Networking –** At least ½ hour should be reserved. We have used holiday themes or games to encourage new introductions between attendees. Afternoon sessions may end with networking drinks.

- **Topics –** Vary topics so there is a good mix of topics 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 will be created by GEO.

EVENT PROMOTION

- **Share the invite** with the Chapter Leadership Team and Board Liaison for redistribution to their contacts and relevant board committees

- **Invite your network -** distribute invitations from your organization, to your clients and colleagues.

- **Send reminders** "Come see me speak…" (contact GEO for social media post graphics)

- **Conduct personal outreach** by email and phone

- **Use Social Media and reshare** via the Chapter LinkedIn page

- **Promote via GEOconnect** In the open forum and on the community Chapter page

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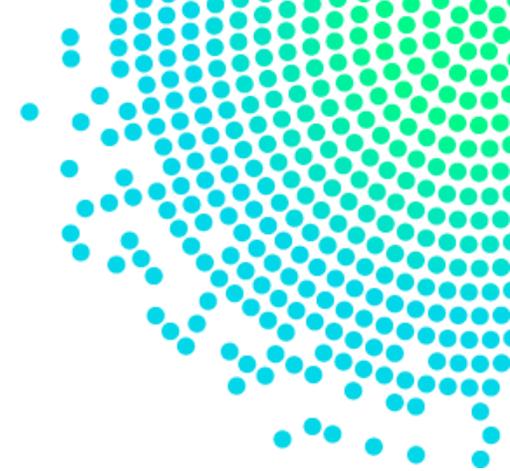
GEOconnect

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

- Promote your Chapter events
- Promote engagement through discussion threads
- Share event documents, pictures and thought leadership content
- Contact members assigned to a Chapter

GE **YOUR**COMMUNITY **LOCAL CHAPTER**

GEOconnect

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)

- All chapter team members should have a signed NDA on file before community admin access is granted.
- 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.

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GEOconnect
BUILDING AN ENGAGED COMMUNITY

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

- 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 Reach out to chapter members individually or as a group. GEO has assigned chapters to 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

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GEOconnect
ADDING EVENT ASSETS TO THE LIBRARY

You can use the **LIBRARY** to:

- Share your event pictures, presentations and documents

- Promote your chapter event to your community, even if they may have missed the meeting - Request permission from the speaker(s) before posting presentations

TO ADD A LIBRARY ENTRY

1. Go to your community, **click Add Library Entry**
2. Use the **Description** to add images and description
3. Use **Entry Type** to upload your presentation and any other event documents
4. **Upload** your files, and click **Next** to describe or **Finish** to upload.
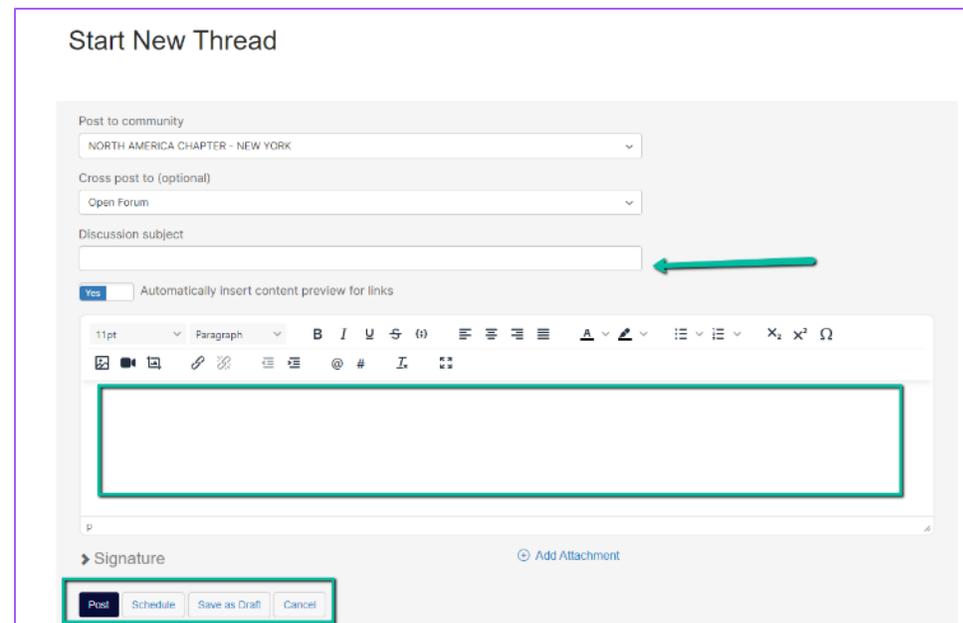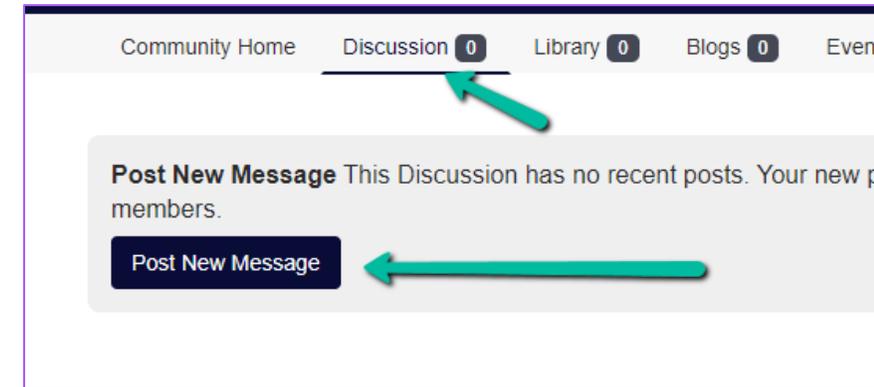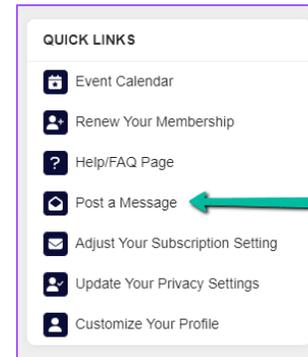
GEOconnect DISCUSSION THREADS

TO START A DISCUSSION THREAD:

- Click **Post a Message** on your home page or under discussions in your community tab.

QUICK LINKS
- Event Calendar
- Renew Your Membership
- Help/FAQ Page
- Post a Message
- Adjust Your Subscription Setting
- Update Your Privacy Settings
- Customize Your Profile

Community Home | Discussion 0 | Library 0 | Blogs 0 | Even

Post New Message This Discussion has no recent posts. Your new p
members.

Post New Message

- Create your discussion thread
- Select the community you want to post to, add the subject, and description. Then create the post - choose to post, schedule, save a draft, or cancel it.
- To delete a post contact Mary

Start New Thread

Post to community
NORTH AMERICA CHAPTER - NEW YORK

Cross post to (optional)
Open Forum

Discussion subject

Yes   Automatically insert content preview for links

11pt   Paragraph   B I U S {}   A @ #   ☰ ☰ ☰ ☰   A ▾ ▴ ▾   ☰ ▾ ☰ ▾   X₂ X² Ω

Signature   ⊕ Add Attachment

Post   Schedule   Save as Draft   Cancel

DATA PRIVACY

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 and team members are required to sign an NDA before GEO provides them with access to GEOconnect to any personal information that may be visible. <u>Contact Mary to request an NDA</u>.

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.

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PARTNERING WITH OTHER TRADE GROUPS

From time to time, it may be appropriate to partner with other organizations to host events.

- Please **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

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EVENT DAY AND POST EVENT DAY ACTIONS

- **TAKE PICTURES!** Please report back on events with stats and pictures – share the fun on social media.
- **Track attendance -** Use the registration list provided, sort by alpha last name
- Ensure all attendees sign in or are checked in. Manually add walk-in attendees (name, company, email)
    - Send attendee check-in sheet and CPE sign-in sheet if applicable 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

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LINKEDIN

GEO has established LinkedIn showcase pages for our Chapters. Use GEO's Chapter showcase pages to attract new and existing contacts to your network and to promote your events and content.

- Access is granted to Chapter Leaders and coordination team of the designated Chapters. Note, all admins of a Chapter showcase page must complete an NDA Contact Kaitlyn Hallman to request access.

- Use Linkedin to:
  - **Promote your GEO event**
  - **Create polls or questions to increase engagement**
  - **Share articles featuring regional updates**
  - **Share industry-related job opportunities in your region**

LINKEDIN
CHAPTER SHOWCASE PAGES

To grow your Chapter showcase page:

- **Invite your contacts to follow the page** – when on the Chapter page select 'invite to follow' use the location feature to find connections in your Chapter region and select invite to follow.

- Share posts while tagging your fellow Chapter Members, Leaders and speakers, to increase your visibility.

- GEO will also signpost to your showcase page on our main GEO page while promoting events.
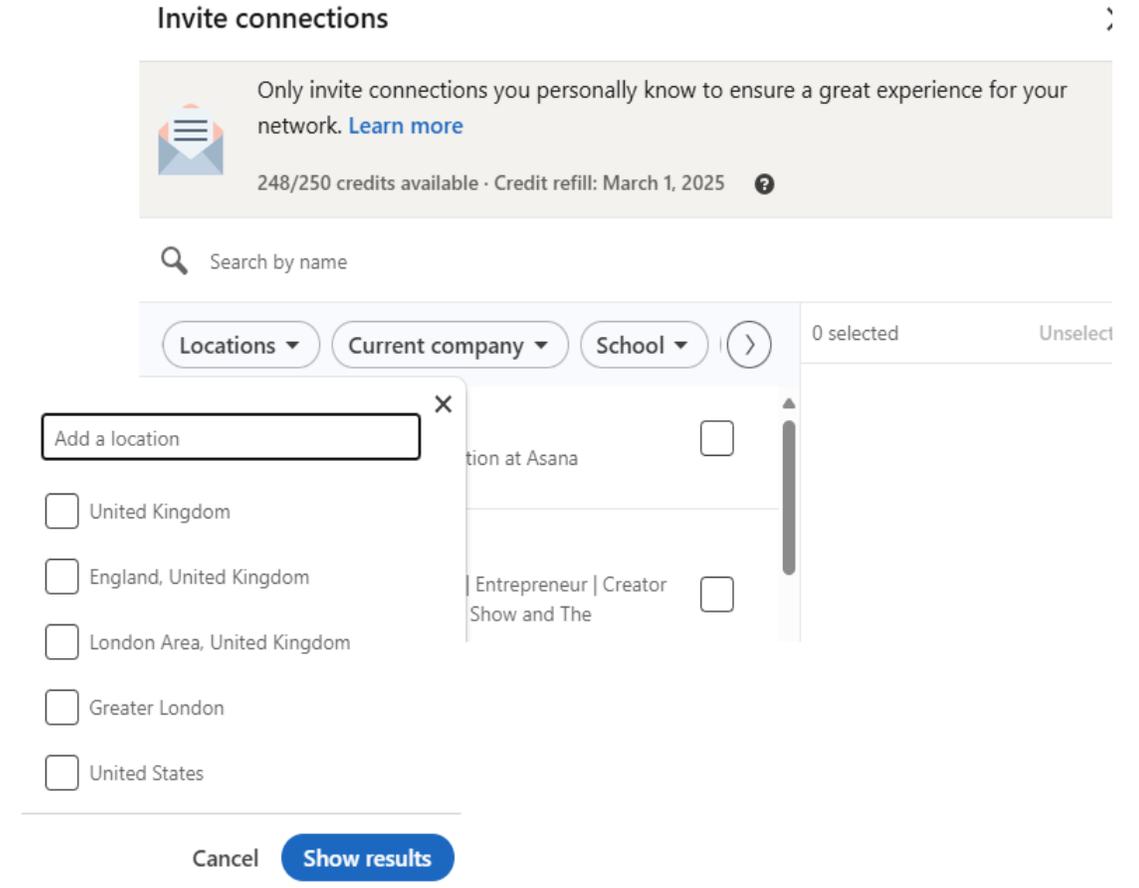
Invite connections

Only invite connections you personally know to ensure a great experience for your network. Learn more

248/250 credits available · Credit refill: March 1, 2025

Search by name

Locations ▾   Current company ▾   School ▾   ❯   0 selected   Unselect

Add a location ✕

☐ United Kingdom

☐ England, United Kingdom

☐ London Area, United Kingdom

☐ Greater London

☐ United States

Cancel   Show results

LINKEDIN
CHAPTER SHOWCASE PAGE GUIDELINES

We are excited to have you contribute content and engage with our community.

To ensure a positive and professional environment, please follow these guidelines and terms of use when posting.

- **Relevance**: Posts should be related to our chapter's mission, goals, and areas of interest. Content should contribute to the professional growth and development of the community and align with our values.
- **Professional Tone**: All posts should maintain a professional and respectful tone. Avoid offensive language, inappropriate humor, or any content that could be perceived as discriminatory or derogatory.
- **Accuracy**: Only post factual, accurate, and verifiable information. If referencing external sources, please include proper attribution.
- **Respect Copyright**: Do not post content that infringes on copyrights, trademarks, or any other intellectual property. Ensure you have permission to share or use images, videos, or text.
- **Respect Privacy**: Do not post personal information, confidential material, or anything that could violate privacy. Always ask for consent before sharing photos or identifying information about individuals or organizations.
- **Frequency**: Be mindful of the frequency of posts. Avoid overwhelming the audience with too many posts in a short timeframe. Aim for consistent, valuable, and engaging content.
- **Comments**: When responding to comments, maintain a polite and professional tone.

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LINKEDIN
CHAPTER SHOWCASE PAGE GUIDELINES

The following content is prohibited:
- Content that promotes hate speech, discrimination, harassment, or bullying in any form is strictly forbidden.
- Illegal, inappropriate or unethical content
- Avoid sharing spammy or overtly sales-driven content or irrelevant links.

Content Ownership: By posting content on our LinkedIn page, you confirm that you own or have permission to share the content and that it does not infringe on any third-party rights.
- You grant us the right to use, share, and distribute your posts on the LinkedIn page, as well as for marketing and promotional purposes related to the chapter's activities.

Violation of Terms: Failure to adhere to these guidelines and terms may result in:
- Removal of content
- Temporary or permanent suspension from posting on the page
- Report to LinkedIn if necessary

By following these guidelines, we can ensure that the chapter's LinkedIn page remains a valuable and respectful resource for all members and the broader community.

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THANK YOU FOR YOUR SUPPORT OF GEO CHAPTERS

If you have any questions, please contact the GEO team or visit the CHAPTER RESOURCES PAGE

YOURCOMMUNITY LOCAL CHAPTER