

ZDH PARTNERSHIP PROGRAM

**MANUAL ON ORGANISING AND MANAGING
CHAMBERS OF COMMERCE AND INDUSTRY**

BY

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F O R E W O R D

The aim of the manual on “Organising and Managing Chambers of Commerce and Industry” is to provide chamber staff and active Board Members with a practical compendium that they can use for all chamber operations. In this context, emphasis has been placed on adding checklists and forms.

The readers will also be getting an insight into the administrative machinery of chambers, problems that occur in running a chamber, and recommendations of how to solve them.

The introductory chapter gives a brief overview of the main role and functions of chambers, and the manual closes with an appeal to intensify planning, a recommendation which is very much justified in view of a tendency towards ad-hocism prevalent in many chambers.

Ms Judy Tan, the author, has composed the manual based on her profound experience with the Singapore Manufacturers Association. Her style and the layout that she chose provide for good reading.

The ZDH Partnership Program has over the past years published a number of chamber guidebooks. This manual is certainly a valuable addition to that stock of reference materials.

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CHAPTER ONE
CHARACTERISTICS, ROLE AND FUNCTIONS
OF CHAMBERS OF COMMERCE AND INDUSTRY

Characteristics

A Chamber of Commerce and Industry is

an autonomous organisation

of businesses and individuals

aimed at promoting commerce and industry.

It may be a private set-up with voluntary membership (as in Singapore)

or one established under public law, with compulsory membership (as in Germany)

or one regulated under public law status with voluntary membership (as in Japan).

It could take the form of ...

- a national establishment eg. the Thai Chamber of Commerce
- a provincial body eg. the West Java Chamber of Commerce and Industry
- a town or district setup eg. the Dhaka Chamber of Commerce
- an ethnic grouping eg. the Singapore Chinese Chamber of Commerce and Industry.

Mission

Despite their wide diversities, Chambers of Commerce and Industry generally share a common mission, which is ...

to promote, develop and further the economic well-being of members

by providing

- a collective voice in advocacy to represent and protect members' interests
- quality services to help members enhance their competitiveness and succeed in their businesses

thereby contributing significantly to the economic progress of the nation.

Agenda

To achieve their mission, Chambers of Commerce and Industry have on their agenda, a broad range of functions and services. These include ...

- representation
- networking
- information services
- business and trade development
- training and consultancy services
- membership development
- special export promotion services, etc.

The following table lists in general, the range of activities*¹ covered under the various functions ...

Functions	Activities
Representation	hold regular dialogues with government to advocate, provide feedback on, and help fine-tune policies and legislations affecting business practices
	serve on statutory boards and government committees to help formulate policy guidelines and set standards that will enhance business climate and members' competitiveness
Networking	forge strategic alliances with local and foreign business organisations to establish and develop mutually beneficial relationships via Memoranda of Understanding, Joint Consultative Committees, etc.
	join a global network of Chambers of Commerce to facilitate co-operation (eg. ASEAN-CCI, CACCI, etc)
	provide leadership to co-ordinate members' efforts to trouble-shoot, address, solve common problems/issues affecting business operations

¹ These functions and activities are discussed in detail in the 1993 ITC/ICC/ZDH publication entitled "Income generating activities of Chambers of Commerce" and the 1996 ITC/ICC/ZDH technical paper on "Chambers of Commerce services to small and medium sized enterprises".

Functions	Activities
Membership Development* ²	<p>Build up a membership base through recruitment of new members and retention of existing ones. This is achieved by ...</p> <ul style="list-style-type: none"> • launching membership drives to supplement on-going recruitment • sustaining members' interest by offering quality services, enhancing membership status and privileges • encouraging co-operation and fraternity amongst members by organising social and sports events
Information Services	provide relevant business information to members such as information on business opportunities, technological advancements, government rules and regulations, etc ³
	maintain a trade library for members' use
	conduct market surveys and economic research and circulate findings to members through newsletters, economic bulletins, general membership circulars or IT tools

² This subject is dealt with in detail in two ZDH/SEQUA publications entitled "Strategies for membership recruitment and retention for Chambers of Commerce & Industry" and "Attracting new members/membership administration".

³ The full range of relevant business information services is detailed in a ZDH/SEQUA manual on "Developing and operating an information service for chambers and trade associations".

Functions	Activities
Trade and Business	publish a directory of members, their businesses and capabilities
Business	process trade enquiries
Development	<p>operate a business matching center to provide services such as ...</p> <ul style="list-style-type: none"> • arranging buyer-seller meetings • providing facilities and secretarial services for meetings between trade visitors and members
	<p>identify trade and investment opportunities and help members maximise these through</p> <ul style="list-style-type: none"> • organising trade and investment missions • arranging meetings between members and visiting trade and investment missions • organising trade fairs and exhibitions • co-ordinating members' participation in trade shows
	<p>maintain a product display center to showcase members' products (product display centers are usually sited within the chamber's premises for easy access to trade visitors but if finances allow, they could be sited in major overseas markets as in the case of the Hongkong Trade Export Council)</p>
Special Export Services	issue certificates of origin, ATA carnets

Functions	Activities
Training and Consultancy/ Advisory Services	operate a training center* ⁴ that will offer human resource development programmes, skills and technological upgrading courses, etc
	organise meetings, conferences, workshops, seminars to provide members with fora for exchange of views and experiences
	<p>encourage member companies to enhance competitiveness through</p> <ul style="list-style-type: none"> • quality management – eg. set up quality circles; adopt “good housekeeping” practices; help members to attain ISO standards • improved product design – eg. organise competitions to reward good product and packaging designs
	encourage members to computerise their operations and take other IT initiatives to achieve greater efficiency
	maintain a list of consultants, resource personnel, professionals, etc to whom referrals can be made if members require their services

⁴ The operation of a training center is the subject of a ZDH/SEQUA manual on “Developing a Training Centre within a Chamber or Trade Association”.

Functions	Activities
Training and Consultancy/ Advisory Services	render basic in-house consultancy services by Chamber staff – eg. on energy conservation, environmental issues, etc as in the case of the German Chambers of Small Businesses
Services (cont'd)	offer arbitration/mediation/conciliation services to help resolve trade disputes

Other Services

In addition to the above list, some Chambers of Commerce and Industry offer special services, eg.

- the Singapore Confederation of Industries (formerly known as the Singapore Manufacturers' Association) operates the Singapore Article Numbering Council which issues bar-codes to members
- the Pune Chamber of India operates an employment service to help their members recruit qualified staff
- the Chamber of Commerce and Industry in Colombo conducts tea auctions
- the Chamber of Commerce and Industry in Angeles (Philippines) runs a credit program
- the provincial Chamber of Commerce and Industry in Jogjakarta (Indonesia) offers telecommunications facilities to its members and the general public.

Strengths and weaknesses

The two broad categories of legal structures^{*5} of Chambers of Commerce and Industry (ie. public vs. private law systems) give rise to two different sets of strengths and weaknesses. These are listed in the following table.

Chamber system	Strengths	Weaknesses
Public Law Chambers	<ul style="list-style-type: none"> • compulsory membership • monopoly • formal access to public administration 	<ul style="list-style-type: none"> • conflict of interest since they have dual roles as a public as well as private sector's "vehicles" • possibly lack of commitment from members since membership is mandatory
Private Law Chambers	<ul style="list-style-type: none"> • independent • autonomy • • 0members may be committed to the Chamber's cause as they join voluntarily 	<ul style="list-style-type: none"> • income from subscriptions may be limited as membership is not mandatory • competition from other service providers • free-rider altitude of potential members is a disincentive to join • the membership base will not fully represent the business community

⁵ This subject is well covered in a publication entitled "National Chambers of Commerce – A Primer on the Organization and Role of Chamber Systems" published by The Center for International Private Enterprise (CIPE).

CHAPTER TWO

THE ADMINISTRATIVE MACHINERY

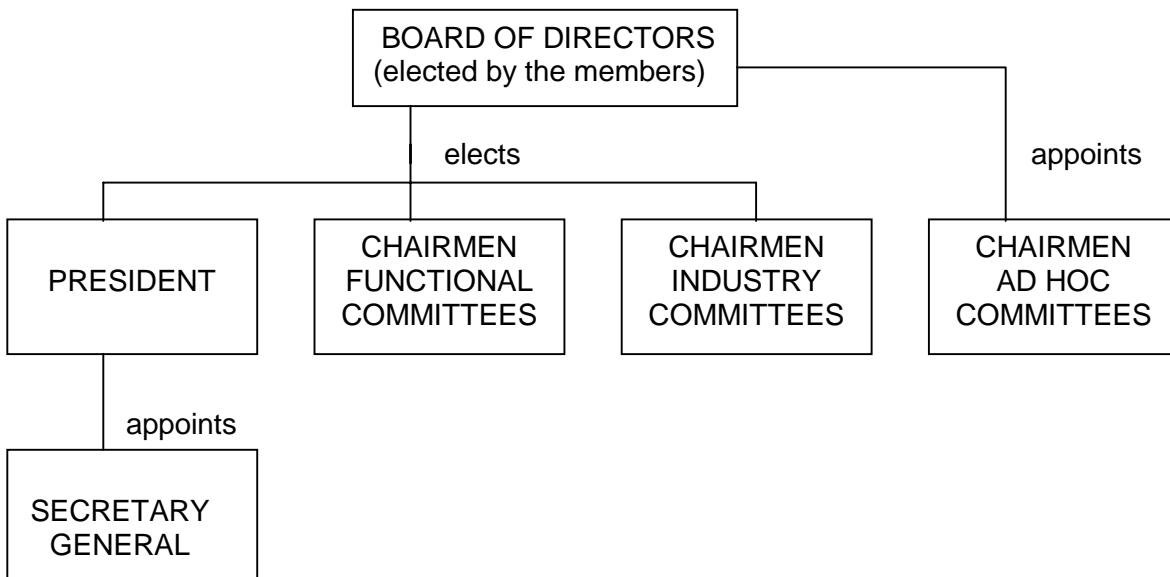
The Organisation Structure

The power of managing the affairs and finances of a Chamber of Commerce and Industry is usually vested in a Board of Directors elected from among the general membership, usually on an annual or biennial basis.

The Board of Directors is supported by

- functional committees eg. Finance Committee, Membership Committee
- industry committees eg. Banking & Insurance , Craft & Services
- ad-hoc committees specially set up to address specific/ topical issues or projects eg. when a Chamber is considering buying new premises to house its secretariat, it might set up an ad-hoc committee to oversee the project.

The day to day running of the chamber and its activities is handled by a permanent secretariat comprising paid employees headed by a Secretary-General or Executive Director. A basic organisation chart of a Chamber could be as follows ...



There are many variations to the organisation structure of Chambers of Commerce and Industry – eg. in some cases, both the President and the Secretary-General are elected directly into office by the general membership. In some cases, the President appoints all committee chairmen. In some cases, he or the Board may have also, the prerogative to co-opt members (subject to a pre-determined maximum number) to the Board. In some Chambers where the membership base is very large (as in the case of Germany and other countries in Western Europe) the Board of Directors is elected by a group of delegates who are themselves elected by the membership. (see Annex 1). Designations and titles also vary – for example, in some cases, Functional Committees are called Standing Committees and the Secretary-General is called the Executive Director.

The Board of Directors

It is common to find the following three categories of Board members ...

<p style="text-align: center;">Elected Board members</p>	<p style="text-align: center;">Nominated Board members</p>	<p style="text-align: center;">Honorary Board members</p>
<p>These are elected from among the general membership on an annual or biennial basis</p>	<p>These are individuals who are invited to the board by the Board of Directors or the President with the expectation that they contribute significantly to the Chamber's development</p>	<p>These are usually past Presidents who are invited to serve on an Honorary basis</p>

As the Board's term of office is rather short (usually one or two years) commitment, consistency and continuity may be sources of concern.

To some extent, continuity is provided by past Presidents serving as Honorary Presidents. Also, some chambers only elect half the number of Board members at one time to ensure continuity.

In the interest of consistency, it would be a good practice for the secretary of the Board to keep a file of all major policy decisions made by Boards of Directors through the years. This file would be a useful reference if the Board wishes to know whether one of its policy decisions conflicts with any precedence set by previous Boards. The information to be recorded include dates of Board meetings, subject matters (eg. Finance, Membership, PR, Administration, etc) issues discussed (eg. budgetary controls, membership fee structures, authorised spokesmen at press conferences, etc) and decisions reached.

To facilitate discharge of its duties, the Board of Directors elects from among themselves

- President (in some cases, the President is elected directly into office by the general membership)
- Vice President (in some cases, the President appoints the Vice President)
- Honorary Secretary
- Honorary Treasurer
- Chairmen of functional committees (in some cases, they are appointed by the President)
- Chairmen of industry committees (in some cases, these are elected into office by industry groups)
- Chairmen of ad-hoc committees (as and when needed)

The role of the Board of Directors

The duties of the Board of Directors can be broadly classified into 3 general categories

Executive duties:

- Policy making
- Target setting
- Periodic review of policies and directions

Constitutional duties:

- Admittance & termination of members
- Managing the business, funds and properties of the Chamber
- Appointment of committees and delegation of authority to them
- Introducing new bye-laws or amendments to the Constitution for expedient regulation of the Chamber's affairs provided that these are approved by a general meeting of the members at an AGM or EGM
- Entering into arrangements with other organisations on terms and conditions that are deemed advantageous to the Chamber provided that the objectives of these arrangements are not inconsistent with the objectives of the Chamber

Administrative duties:

- Ensuring that the Secretariat under the management of an appointed Secretary-General (or Executive Director) correctly interprets policies laid down by the Board and meet targets set
- Providing leadership in activities and functions involving the general membership

- Representing the Chamber and its members in ...
 - dialogues with Government & other business organisations
 - serving on statutory boards or other public or private bodies whose terms of reference have relevance to the Chamber
 - meetings with foreign business leaders at international conventions.

As the Board of Directors is the main policy setting unit of a Chamber, the caliber, foresight and experience of the Board members are vital to the Chamber's success. Candidature for election to the Board is voluntary, so the most suitable individuals to manage the Chamber may or may not seek office. To some extent, this can be offset by provisions for the elected Board to nominate or appoint such individuals to serve on the Board.

"Board-related" problems include cases where ...

- one industry group dominates to the extent that other sectoral interests are discriminated
- there is "in-fighting" amongst Board members arising from sectoral conflicts or a hidden agenda
- the President practices cronyism when appointing the Secretary-General and this may result in the Chamber having a Secretary-General who is not suitable for Chamber work
- the Secretary-General is elected by the general membership and he cannot agree with the President on the administration of the Chamber. Since both are elected into

office by the general membership, this may lead to an “impasse” that will affect the efficacy of the Chamber.

To some extent, the problem of having any one group dominating the Board can be avoided by imposing a limit on the number of seats allocated to any one industry sector.

Some Chambers also limit the number of consecutive terms that a key office bearer (particularly the President and the Honorary Treasurer) may hold office in the same position. However, they may hold office in other positions, eg. the Honorary Treasurer may, in his next term of office, be elected/appointed Honorary Secretary.

There is also merit in having the Executive Committee or Management Committee and not the President alone, appoint the Secretary-General.

Executive Committee

When the Board of Directors is too large in number, the Board will elect from amongst itself, a small group to form an Executive Committee to manage the Chamber and carry out the Board's duties expeditiously. The Executive Committee meets regularly (usually, monthly) to act on behalf of the Board and is expected to obtain the Board's endorsement on decisions made on behalf of the Board. It is also expected to submit regular progress reports to the Board. The Executive Committee should be chaired by the President or in his absence, by the Vice President and should include key office bearers ie. the Honorary Secretary, Honorary Treasurer and Chairmen of functional committees. The Secretary-General (or Executive Director) usually functions as the secretary of the committee.

Functional Committees

The Functional Committees (or Standing Committees) are provided for in the Constitution of the Chambers and should be headed by Board members as they oversee the Chamber's activities in key areas such as membership matters; finance; publications and public relations; trade and business development; research and training.

Industry Committees

As Chambers of Commerce and Industry are multi-sectoral business organisations, it is common to divide the membership into broad trade and industry groupings such as banking and insurance, commerce, industry, arts and crafts, etc and to set up committees to represent these sectoral interest. In some Chambers, the Chairmen of these Committees are elected by the industry sectors directly on to the Board of Directors.

Ad- hoc Committees

The Board might when the need arises, appoint ad-hoc committees to trouble-shoot new projects or to address specific topical issues that affect the members (eg. shortage of raw materials as a result of political or natural crisis in the country of a major supplier).

Functional and Industry Committees are important components of the Chamber's administrative machinery. However, problems could arise when there is a conflict of interest – for example, the Finance Committee may decide to terminate membership of recalcitrant members with long outstanding dues while the Membership Committee may prefer to retain them to boost up the membership base. Conflicting instructions from these two committees would in turn, give rise to problems between the respective departments in the Secretariat servicing these committees. Industry committee members competing for power and control can also cause conflict among themselves and correspondingly, secretariat staff members.

There are no easy solutions to such problems. To some extent, these problems could be alleviated if the President or the relevant Committee Chairmen could inculcate team spirit and co-operative mindsets among their committee members and the Secretariat staff.

Communication is another area where problems could arise if the number of committees is too large resulting in a situation where the Board is not well informed of what the various committees are doing. Poor co-ordination of the various committees' work plans may result in duplication of efforts and ineffective use of manpower and resources. It is therefore a good practice for the Board to insist on the various committees' submitting workplans and reports of their activities to the Board or the Executive Committee at their monthly meetings (see Annex 2 for sample format for such reports).

In some chambers, there is also a gulf between the Board and the secretariat staff. Although the Secretary-General is present at the Board's meetings, the secretariat staff may not have recourse to the Board if they have problems especially if the Secretary-General is the source of the problem. In this respect, it is a good practice for the Board to allow heads of departments to attend Board meetings. Besides being kept informed of

the Board's expectations and plans, the heads of departments could provide the Board with new ideas and also assist their respective functional committee chairmen render activities reports to the Board. Some chambers also appoint a Management Committee to co-ordinate Secretariat matters.

The Secretariat

The Secretariat's role is to _____

- implement policies laid down by the Board of Directors
- achieve targets set by the Board of Directors and render periodic reports to the Board on its progress
- pursue projects and activities that will enable the Chamber to attain its mission
- monitor trends and developments in commerce and industry and alert members accordingly
- provide secretarial support for Board and committee meetings and keep proper record of proceedings
- make recommendations to the Board and members on policies and activities that will enhance the effectiveness of the Chamber in rendering services to its members
- handle the day to day operations of the Chamber.

The Secretariat comprises full time staff headed by a Secretary-General /Executive Director who is (in most cases) appointed by the Board of Directors or the President. The size of the Secretariat varies with the size and finances of the Chamber but some key staff members in most Chambers include the Secretary-General (or Executive Director) the Administration and Finance Manager, Assistant Secretaries and Executive Officers. Depending on its ability to pay, Chambers may also engage staff with specialised skills in training, information technology, research, public relations and marketing.

The effectiveness of the Secretariat depends not only on the professional capabilities of the staff, but also on the degree of independence it is given by the Board, to interpret and implement policies. A weak Secretariat that could not or is not allowed to make independent decisions and exercise judgement in exigencies could seriously impede progress and efficiency. Problems also arise for Secretariat staff when ...

- the Board or committees are vague in their policy guidelines or instructions
- Board or committee members give conflicting orders or make independent direct demands/requests on staff (circumventing the Secretary-General)
- Committee members expect “special privileges” – eg. at a social function, they expect to be seated with VIPs; they register for a talk or seminar after the deadline indicated for registration and still expect to be included even though participation is closed and the event is at “full-house” capacity; they are the last to pay up for an annual dinner but expect to be allocated the “best” table (nearest the Guest of Honor’s) even though the marketing circular stated that allocation is on a “first pay, first allocated” basis. These may all be very petty issues but they do cause a lot of unpleasantness for the staff

- representatives of member companies adopt an unreasonable “employer-employee” mindset in their approaches to Secretariat’s services or assistance. If the membership base is very large, this would translate into an impossible number of self-perceived “bosses” for the Secretariat staff to cope with!

The Secretary-General can address these problems if he is sufficiently empowered by the Board to take control of the situation and assume full accountability and responsibility for his staff’s discretion in handling such demands/requests.

Key officials of the Chamber

The President is the de-facto head of the Chamber and has a fiduciary duty to ensure that the Chamber fulfills its responsibilities to its members. To a large extent, the success of the Chamber depends on his leadership quality, dedication to office and willingness to commit time, energy and resources to the Chamber.

The President has multiple roles to perform and a number of executive and administrative functions to discharge. These are as follows ...

Role	Functions
Leader	<ul style="list-style-type: none"> heads Board of Directors and chairs Board meetings has final responsibility for the Board's work plan for the term of his office and for targets and priorities for Board and Secretariat chairs general membership meetings

Role	Functions
Administrator	<ul style="list-style-type: none"> • appoints Secretary-General (or Executive Director) and monitors Secretariat's progress in meeting targets set by the Board • delegates authority and assigns tasks to other Board members and the Secretariat • performs symbolic leadership duties such as receiving visitors, signing documents, hosting dinners, officiating at social, sports and other membership events organised by the chamber
Negotiator/ Spokesperson	<ul style="list-style-type: none"> • represents the Chamber in dialogues with the Government • heads delegations attending regional and international meetings • speaks on behalf of the Chamber at press conferences and high level events • makes official announcements
Mediator/ Facilitator	<ul style="list-style-type: none"> • casts the deciding vote in the event of an impasse at Board meetings • chairs "meet-the-members" sessions and, if appropriate, reconciles differences between members and resolves trade disputes

The Honorary Secretary

is elected by the Board members from among themselves. His role is akin to that of a company secretary. However, since he is serving on a voluntary basis, the implementation of duties is, to a large extent, carried out by a paid staff of the Chamber – usually the Administration Director. The task assigned to this position includes ensuring that the chamber complies with legal and constitutional requirements (inter alia those governing elections & annual general meetings) and taking responsibility for proper records of proceedings and filing of legal documents.

The Honorary Treasurer

is also elected by the Board members from among themselves and is also serving in a honorary capacity; hence implementation of his duties are carried out largely by another paid staff of the Chamber – the Finance Director (in smaller Chambers, the administration and finance portfolios are vested in one individual rather than two). The duties covered under this post include the management of the funds and properties of the Chamber, financial planning, budget control, proper maintenance of accounts, signing of cheques, etc.

The Secretary-General is the chief operating officer of the Chamber. He is responsible and accountable to

the Board of Directors for

- proper interpretation and implementation of policies laid down by the Board
- attainment of targets set
- rendering regular progress reports to the Board
- recommending to the Board such changes in policies and directions as are needed to ensure the effectiveness of the Chamber in promoting members' interest
- managing the Chamber's funds and properties
- submitting an annual budget for the Board's approval and ensuring that expenditure falls within budgetary limits

the Secretariat for

- planning a Secretariat organisation structure that is effectively geared to function with maximum efficiency
- staff recruitment and termination, management, training and motivation
- drawing up a work plan and co-ordinating the Secretariat operations particularly in the areas of membership growth, services and activities
- leading Secretariat's efforts at revenue generation and fund raising.

CHAPTER THREE

STAFF, OFFICE AND MEMBERSHIP ADMINISTRATION

Secretariat organisation structure

Given the financial limitations that most Chambers have to contend with, a well-conceived Secretariat organisation structure is essential to the Secretariat's efficiency and productivity. Few Chambers can afford to employ personnel with highly specialised skills but a good team of carefully selected and suitably qualified staff led by an able Secretary-General will optimise the Chamber's effectiveness in achieving its mission.

The nature of Chamber's work is such that the Secretariat's activities fall under two broad categories ...

Operations

cover services/benefits which members having paid subscription dues, will rightfully expect to receive for free – eg. information through membership circulars, use of library, basic secretarial support, business referrals (trade enquiries) advocacy.

Business

cover activities which are revenue generating or at least, self-financing – eg. trade fairs and exhibitions, trade missions, talks, seminars, workshops, training courses, annual dinners, golf tournaments and other social and sport events.

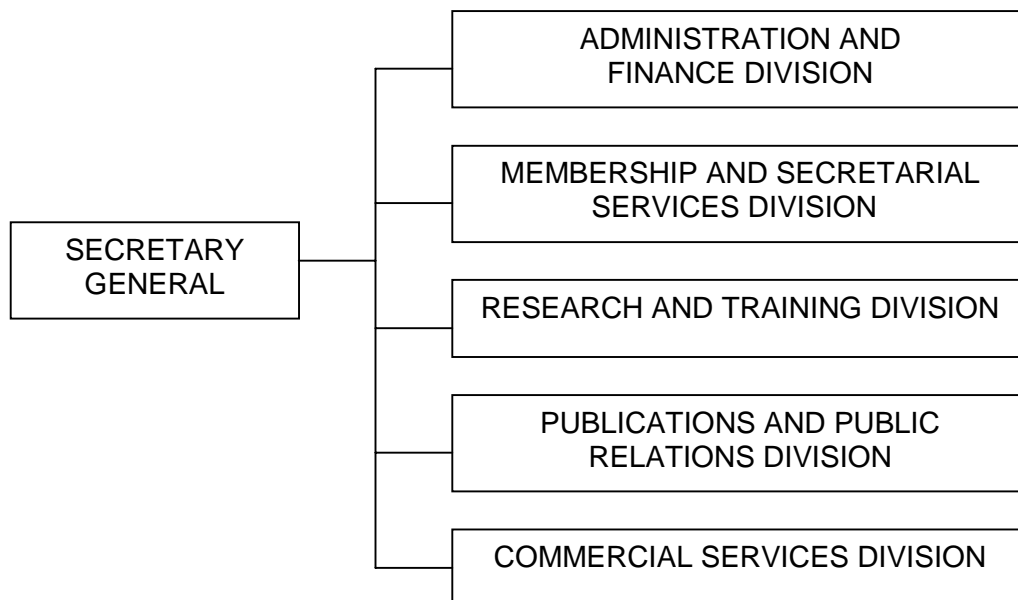
The divisions handling the operations services can be considered “cost centers” and the divisions handling revenue generating activities can be treated as “profit centers”.

However, due to limited resources, Chambers have often, to combine “operations” and “business” activities in one division – eg. the Publications and Public Relations Division

may produce a directory of members and newsletters that are circulated to members and relevant trade associates, free of charge. The Division may, at the same time, sell other publications such as economic bulletins or advertising space in the directory/newsletter to generate revenue.

Nevertheless, it is useful to operate with a cost/profit centre approach so that the cost and profit of the various activities are known. This may influence the decision of the Chamber in enhancing or decreasing one or the other activity. Some activities will always remain cost centers and they need to be subsidised by other activities. However, the amount of occurring losses should be known.

A typical Secretariat organisation structure could appear as follows ...



Another variation of a sample Secretariat organisation structure is in annex 3.

Staff requirements and qualifications

Staff recruitment falls under the ambit of the Secretary-General. The size, staff-mix and professional qualifications of the staff vary with the Chamber's vision, focus and finances. Generally however, a majority of Chamber's executive staff are engaged in providing services to members and "characteristic" requisites of the job are competency in English and well-honed info-communication abilities.

A common problem that Secretariat staff encounter is that the representatives of member companies tend to treat them as "employees" and it is not always easy for the Secretariat staff to meet such "bossy" mind-sets with equanimity; hence, a well-developed interpersonal skill would be a definite advantage.

Staff administration

Staff administration covers ...

- recruitment (interview, pre-employment screening) and offer of employment (includes job descriptions, assessment of job-worth and determining remuneration packages)
- setting personnel policy (includes staff discipline, salary, overtime and leave administration)
- maintaining employment records (include staff bio-data, employment commencement date, overseas assignments, promotions, transfers to departments within the Chamber, disciplinary actions, if any, etc)
- staff training and development
- staff appraisals, salary increments, merit awards, etc

Personnel policies

It is essential that all staff should have a clear understanding of their responsibilities and accountabilities and in this respect, detailed job specifications (see annexes 4 – 6 for sample formats) and a comprehensive **staff manual** is recommended*⁶ The staff manual should outline the Chamber's policy regarding...

- conditions of employment (pre-employment medical examination, period of probation, confirmation, notice of termination or resignation, dismissal, etc)
- remuneration packages (salary scales, payment in kind, transport and other allowances, provident and/or retirement funds, gratuities, annual reviews)
- leave (annual, sick, maternity, compassionate; accumulation of leave)
- medical benefits and insurance
- travel allowances

Staff development and motivation

Most Chambers of Commerce and Industry cannot afford elaborate training programmes for their staff; hence, staff are often initiated “hands on” into their jobs. However, it is pertinent to provide training in cases where ...

- special product/service knowledge are required – eg. in operating a training center, article numbering, export promotion services such as issuance of Certificates of Origin, ATA carnets, etc

⁶ A document entitled “Putting it all together in a procedures manual” prepared by the Chambers of Commerce of the United States contains useful pointers on preparation of staff manuals and job descriptions. Some of these job descriptions are reproduced in Annexes 4 – 6. (A copy of the manual is available from the ZDH Partnership Program).

- training is relatively inexpensive but the skills picked up would be beneficial to the Chamber eg. in the training of receptionists as they are often the first point of contact and their attitude would make a lasting first impression on trade enquirers.

Other training avenues that Chambers of Commerce and Industry may consider are to co-operate with associate Chambers whereby staff could be seconded or attached to them for training on a reciprocal basis. Organisations like the International Trade Center (ITC) and the German ZDH Partnership Program offer free or subsidised training for Chamber staff. These institutions also publish numerous manuals and other documents on chamber/association development and SME promotion that offer useful pointers to Chamber staff.

Chambers face problems of staff attrition through resignations because they offer limited career prospects (since most Chambers cannot afford to carry large secretariats). If Chambers are to retain good employees, the Secretary-General must pay particular attention to staff motivation in the form of competitive remuneration packages, perks such as travel opportunities, job satisfaction and a conducive work environment. Annual salary reviews are also vital although staff appraisal may not be as easy as in the case of profit-making organisations since “bottom-lines” may be intangible and difficult to quantify. However, the Secretary-General could use criteria such as the staff’s rapport with members, ability to meet targets and deadlines and successful completion of projects assigned to him/her (a sample staff assessment form is attached as Annex 7).

Chambers that are engaged in a wide scope of activities will have to place extra emphasis on co-ordination and team-work. For effective co-ordination of the staff’s

activities, the Secretary-General (and if applicable, the Management Committee) should hold regular meetings with the heads of divisions/departments.

Staff meetings are good avenues for ..

- the Secretary-General (and if applicable, the Management Committee) to be kept informed of the activities that the staff are involved in and to monitor progress in the tasks they are assigned to and regarding the targets they are to achieve
- the staff to share their views and experiences and render feedback on policies to the Secretary-General and colleagues
- the staff to identify areas where their respective divisions/departments could pool efforts and resources, to avoid duplication and unnecessary waste of time

Internal controls

Internal controls are essential to ensure that the Secretariat operates efficiently within the framework of policy guidelines and regulations laid down by the Board of Directors.

These controls can be broadly classified under two general categories – financial controls and administrative controls. It would be practical to spell these out in an ***internal controls manual***.

Financial controls - these are foremost in importance in any Chambers of Commerce and Industry. At the beginning of each financial year, the Secretary-General with the assistance of the heads of the various divisions or departments in the Chamber should

prepare an **annual budget** and submit it to the Finance Committee to endorse and recommend it to the Board of Directors whose approval is needed for the budget to be adopted.

The budget should comprise _____

1. an operating budget that envisages income and operating expenditure
2. a capital budget to allocate funds for acquisition or replacement of capital assets
3. a manpower budget to cover staff cost for the year (including provisions for new recruitment)

The Secretariat should operate within the approved budget and any deviation should have the prior endorsement of the Finance Committee. In addition, **project budgets** should be prepared by the organising division/committee and should be cleared by the Finance Committee for the approval of the Board.

The internal controls manual should also be explicit on rules regarding

- **authority to incur expenditure** (usually vested with the President, Honorary Treasurer, Chairman of Finance Committee, Secretary-General and Finance Director, etc subject to different tiers of authorised limits)
- **authority to make financial commitments on behalf of the Chamber** (usually vested with the President who is expected to obtain the Board's endorsement)
- **operation of bank accounts** (for effective control, usually 2 authorised signatories – the Secretary-General *plus* the President, Honorary Treasurer or Chairman Finance Committee, are required to jointly operate the account)

- **petty cash** (specify the staff in charge of petty cash, limit of amount in cash, procedures for topping up the cash and for making payments/ reimbursements)
- **proceeds from cash sales** (eg. from sale of directories) and issuance of official receipts (specify the staff authorised to sign receipts)
- **cash reimbursements to staff for out-of-pocket expenses** (eg transport costs) payments should be effected only if requests are submitted with supporting vouchers (bearing authorisation for expenditure by Secretary-General, Finance Director or heads of department)
- **advances and reimbursements to staff for travel-related expenses** (airfares, airport taxes, hotel, meals, registration fees where applicable)
- **quotations and tenders** (guidelines on invitations to quote or tender for Chamber jobs and acceptance of bids)

Samples of staff administration and internal controls forms pertaining to employee requisition, overtime permits, travel reimbursements, invitations to quote and tender for Chamber jobs are attached as annexes 8-11.

Administrative controls – it is pertinent for the Chamber to set down ground rules governing ...

- **contacts with the media** – authority is usually delegated to the President, Secretary-General and Public Relations Director. The chairmen of project committees should have the President's endorsement before they make public statements on behalf of the Chamber

- ***affiliations with other organisations*** – there are occasions when chambers may decide to subscribe to membership with other organisations (eg. the national confederation of industries, the Asean Chambers of Commerce and Industry, the World Trade Forum). These affiliations may be recommended by the Secretary-General or a committee member but must be endorsed by the Board of Directors and are subject to the Finance Committee's approval of the expense to be incurred
- ***servicing on external bodies*** – sometimes a staff may be invited to serve on committees in other organisations. He or she should obtain clearance from the President or the Secretary-General before accepting such office as any opinion expressed may be interpreted as the official view of the Chamber.

Office procedures

For the guidance of the staff concerned, it is equally important to spell out office procedures governing

- ***correspondence*** – there should be a central mail registry system to record all incoming and outgoing mail (including e-mail, telexes and fax) dates received or sent, subject matter and name of staff to whom the incoming mail was referred to or who sent out the outgoing mail
- ***filing*** – a comprehensive central filing system (manual or electronic) will ensure speedy retrieval of the voluminous correspondence, minutes and discussion/position papers churned out by the Chamber. Rules governing the removal of files from central storage should be explicit to prevent central registry losing track of files

- **archive and disposal of files** – chambers with a long history of existence would find it necessary to archive or dispose of old files. Such decisions should be carefully considered and made by senior staff with the endorsement of the Secretary-General as “warehousing” could be expensive and outright disposal would mean permanent loss of records concerned.
- **use of office supplies and equipment** – to prevent misuse or loss of office supplies and equipment, it is common for chambers to assign a staff (usually an Administrative Assistant) to keep stock of these. He or she will be authorised, within budget controls, to purchase office stationery and other office supplies (eg coffee and tea) and is expected to keep track of usage. In the case of “special purpose” equipments (eg. cameras, projectors, notebooks) acquisitions are usually under the ambit of heads of divisions/departments and the task of safekeeping and tracking usage of these may be assigned to relevant staff in the division/department concerned.

Membership Administration

Membership administration^{*7} concerns include ...

- registration of members (covers basic information such as company's name, address, legal status, year of establishment, products/main area of business, designated contact person for Chamber's matters, date of joining Chamber)

⁷ A more detailed discussion on membership development issues can be found in two ZDH/SEQUA publications entitled “Attracting new members/Membership administration” and “Strategies for membership recruitment and retention for Chambers of Commerce & Industry”.

- categorisation of members (most chambers classify members under the following categories – ordinary, associate and honorary)
- membership dues and registration fees (many chambers adopt a graduated fee structure based on size of member companies in terms of paid-up capital or number of employees)
- retaining members and sustaining their interest eg. by organising new members' receptions to familiarise them with membership services offered; by introducing membership privilege schemes such as affiliation credit card schemes; awarding "loyal" members by ten year membership awards, etc.

An up-to-date and complete membership data base is a pre-requisite for an efficient trade enquiry and business matching service.

CHAPTER FOUR

MANAGING ACTIVITIES, SERVICES AND FACILITIES

Election of Board of Directors

One of the most important events in the Chamber's calendar is the election of the Board of Directors from among the general membership. The Secretary-General usually handles the administrative process of conducting the elections under the scrutiny of an election committee which often comprises Honorary Presidents as they are not likely to stand for elections. The election committee is expected to ensure that the election process is carried out in accordance with constitutional regulations. It supervises the counting of votes and announces the election results at the AGM

Annual General Meetings

The Annual General Meeting (AGM) is held after the election of the Board of Directors (in an election year). The President chairs the AGM with the assistance of the Deputy Vice President, Honorary Treasurer, Honorary Secretary and Secretary-General (or Executive Director).

Some salient matters to bear in mind with regard to the conduct of AGMs are Constitutional requirements regarding ...

- period of notice of the AGM
- items to be included in the agenda

- quorum required and provisions for the meeting to be **adjourned and reconvened** if the quorum is not met
- arrangements for **voting** to be carried out at the AGM.

It is best that the Secretary-General prepares the minutes of the meeting for vetting by the President no later than a week after the meeting. The minutes should record the names of the proposers and seconders of resolutions taken. A standard format of AGM minutes is in annex 12.

Board and Committee meetings

The Board of Directors should convene its first meeting as soon as possible, after the elections, for the purpose of...

- electing office bearers (President, Vice President, Chairmen of Functional and if applicable, Industry Committees)
- setting the schedule for meetings for the year/term ahead
- discussing the Board members' vision for the Chamber and crystallising a plan of action for the new term or, in some cases, for the medium to long term of three to five years.

Correspondingly, the various functional and industry committees should also meet as soon as possible, after election or appointment, to set their action/work plans and schedules.

Thereafter, the Board and the various committees are expected to meet regularly to monitor progress of the projects they initiated and to review and update policies, plans and targets set.

Notices, agenda and minutes of meetings

The secretaries of the various committees should prepare agenda for meetings in consultation with their respective chairmen. The agenda should specify

time and date of meeting

venue for the meeting

items for decisions

items for discussion.

The agenda should be explicit on action required for the various items and be accompanied by supporting papers to facilitate discussion/decisions. A sample format for an agenda for a Board meeting is in annex 13.

Although the dates of meetings are already preset at the various committees' first meetings for the term, the secretaries of the committees are expected to send notices and reminders of meetings to the committee members to avoid poor turnout due to oversight.

Minutes of the meetings should be prepared by the relevant secretaries no later than a week after the meeting and should be submitted to their respective chairmen for vetting before circulation to the other committee members.

The minutes of committee meetings are a most important management instrument to keep the President/ Board/Executive Committee informed about the various activities of the committees.

A common problem encountered by staff in recording proceedings is inconclusive or disorderly discussions on a sensitive item in the agenda and in this respect, it would be most helpful if the chairman would “sum up” before proceeding to the next item.

After each meeting, the committee’s secretary should ...

send aide-memoirs to relevant committee members who have been tasked to follow up on specific issues discussed and who are expected to report at the next meeting

follow up on matters decided by the committee.

Membership services and activities

Companies generally subscribe to membership with a Chamber for

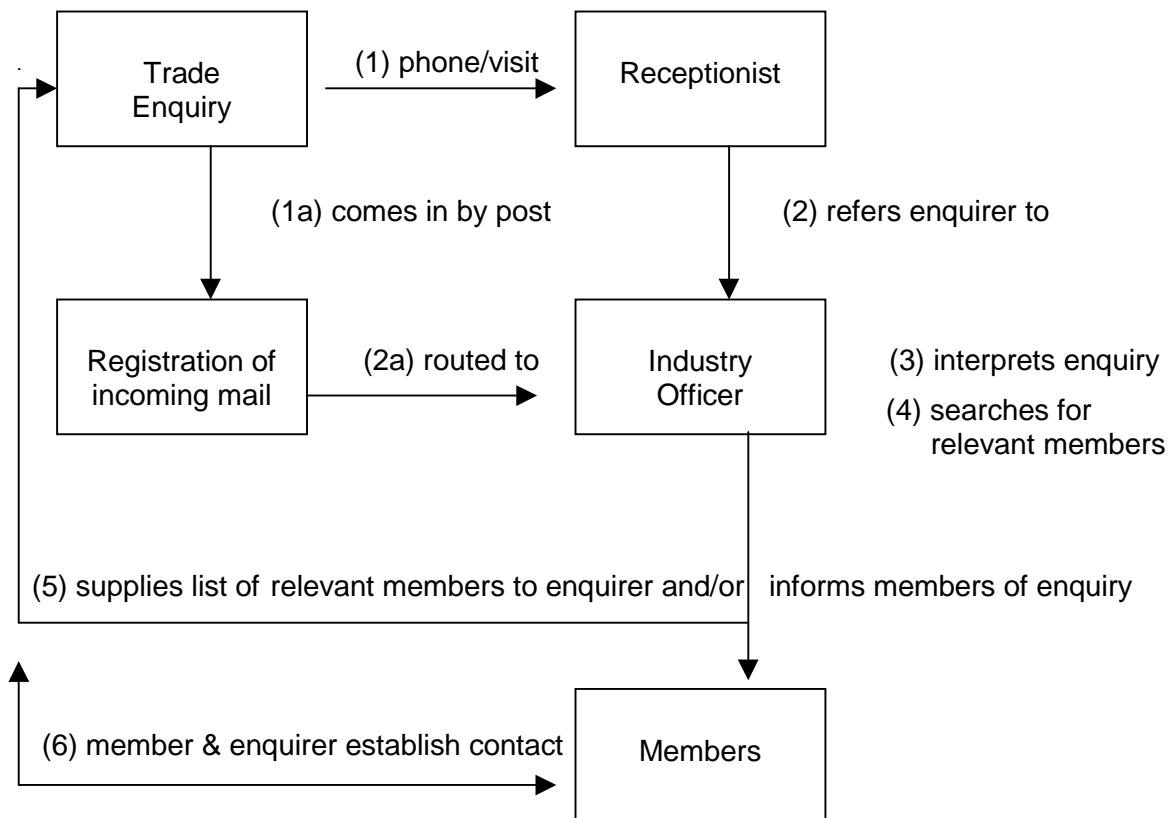
- business referrals/business matching
- trade development and investment opportunities
- information and other services offered by the Chamber
- networking with government, public bodies and other organisations in the private sector
- joining forces with other like-minded companies to advocate for a better business climate to operate in
- social reasons (fraternity, status, image building, etc)

Business Referrals/Matching

Business referrals are effected when the Chamber ...

- processes trade enquiries and re-directs these to relevant members
- organises business matching activities.

Trade enquiries^{8*} could be received by mail, over the telephone or “over the counter” when a trade visitor calls on the Chamber. Briefly, the routing of a trade enquiry is as follows ...



⁸ The procedures for handling trade enquiries are dealt with in detail in a ZDH/SEQUA publication entitled 'A manual of chamber management' which was prepared in co-operation with the Dhaka Chamber of Commerce and Industry, Bangladesh.

Business matching⁹ – aside from responding to trade enquiries, Chambers could take a more pro-active role in business matching by initiating buyer-seller meetings and other support measures. An example of such an activity is the Secretariat organising a meeting between a major buying house and a group of members who could be potential suppliers.

Trade and Investment Opportunities

Trade and Investment development activities include

- organisation of trade and investment missions
- arranging meetings between visiting trade delegations and members
- organising trade fairs and exhibitions or co-ordinating members' participation in overseas fairs and exhibitions.

Trade and investment missions offer good opportunities for members to explore business development potentials in other countries. The organisation of such missions should be approached on a project basis and some basic procedures to follow are...

- Planning the mission
 - scope ie. trade or investment, general or specific
 - timing and duration
 - destination and itinerary
 - budget
- Pre-mission preparations – appointment of mission leader, secretary & treasurer
 - printing of mission brochures
 - contacting counterpart chamber in host country
 - drawing up program for mission
 - travel and accommodation arrangements

⁹ The subject of business matching is discussed in greater detail in a forthcoming ZDH/SEQUA manual on "Setting up a business matching service within the Chamber and Trade Association".

- Carrying out the mission - attending meetings
 - courtesy calls
 - factory visits

- Post-mission follow-up - production of mission report
 - de-briefing sessions

Generally, mission members commit a fair amount of time and expenses to participate in the missions and well-conceived pre-mission planning and preparations are very important to avoid unnecessary problems such as ...

- disappointment with the mission programme because the host chamber did not have
 - enough time to organise their members to meet the mission, or
 - adequate information to match mission members' interest with the programme planned for them

- unforeseen delays arising from failure to confirm flight and hotel bookings

- loss of exhibits/product samples sent out as unaccompanied baggages, etc

(An example of trade mission planning provided by the Delegate of German Industry and Commerce in Singapore is enclosed as Annex 14).

Often, a Secretariat staff is assigned to accompany the mission as the mission secretary. A common problem that he/she is likely to encounter is that the mission members expect him/her to be able to answer all trade enquiries into products/services of members not participating in the mission. If the membership base is very large, the

staff concerned would have a problem coping with such enquiries. Bringing along a copy of the Chamber's directory of members is helpful in this respect. The staff could also register all trade enquiries and e-mail them to his colleagues back home who will then take up the enquiries and respond accordingly.

Another more aggravating problem is that the mission members tend to treat the mission secretary as a personal assistant at their "beck and call". This mindset on the part of the mission members may arise from the perception that they are paying for the staff's expenses which is usually a common cost item in the mission's budget. It might help if the staff's expenses are not reflected as a common cost item but are incorporated in the Chamber's fee for managing and organising the mission.

Post mission reports and de-briefing sessions are useful for the "multiplier effect" it could generate as the mission members can share their observations of the country they visited with other Chamber members who were unable to join the mission but are interested in knowing more about the market.

Hosting visiting delegations not only affirms the Chamber's status as a recognised point of reference for visiting businessmen but is also an effective way to introduce potential foreign business to members.

Upon intimation that a foreign delegation plans to visit, the Secretariat staff should obtain information on the incoming mission's objectives, interest, composition and proposed length of stay and co-ordinate with their counterpart Chamber to plan a programme for the mission. The staff should also collate pertinent general information such as the volume of trade between the two countries and whether there are bi-national

companies operating in either or both countries. Such information on the mission and the two countries' trade and investment relationship should be useful to members who indicate interest in meeting the mission (an example of such an information-sheet is in annex 15).

To ensure that the visiting mission meets the relevant members of the Chamber, the Secretariat staff handling the reception programme would need sufficient time to identify the relevant members, notify them and organise a suitable programme of meetings. This need should be conveyed to the visiting mission's Secretary.

Trade fairs and exhibitions are popular with companies wishing to introduce their products and services to the market. Chambers with adequate resources may prefer to organise their own exhibitions while others may decide to co-organise these with established exhibition companies or to co-ordinate their members' participation in fairs staged by other organisations.

Organising a trade exhibition is a rather mammoth exercise in a Chamber's calendar. The event could easily take 9 to 12 months to plan and carry out and considerable manpower and financial resources are required. However, trade exhibitions are usually good income earners.

A Chamber organising an exhibition for the first time would be well advised to set up a dedicated organising committee to take charge of the project. The organising committee would also need support from sub-committees to concentrate on various key areas such as marketing and publicity, facilities and reception.

The work scope of the organising and sub-committees involved is outlined in the following table...

Committee	Work scope
Organising	<p>Determines - focus of fair (general or specialised)</p> <p>frequency (annual, biennial or once-off)</p> <p>name and logo for the fair</p> <p>timing and duration</p> <p>whether fair should be restricted to trade or open to public</p> <p>whether entrance fees should be collected</p> <p>Draws up project budget</p> <p>Books venue</p> <p>Appoints contractors</p> <p>If applicable, applies for government's trade development incentives (funding, subsidy, tax rebates or double tax deductions as in the case of Singapore).</p>

Committee	Work scope
Marketing and Publicity	<p>Markets fair to members, non-members, overseas participants</p> <p>Produces a fair brochure and a marketing kit</p> <p>Prepares a fair catalogue and markets advertising space in the catalogue</p> <p>Prepares press releases and newspaper supplements</p> <p>Sends out invitations to relevant companies and individuals to visit the fair and to attend the opening ceremony</p>
Facility	<p>Plans fair layout</p> <p>Oversees construction of booths, signages, meeting rooms, walkways and stage for opening ceremony</p> <p>Arranges for supply of furniture, electricity, telephones, organisers' office facilities and equipments, parking, cleaning, etc</p> <p>Arranges security</p> <p>Obtains police, fire and other statutory clearances</p> <p>Oversees dismantling of booths and clearance of debris after conclusion of fair</p>

Committee	Work scope
Reception	<p>Co-ordinates needs of overseas participants – meeting on arrival, hotel arrangements, transport to the fair, custom clearance for exhibits, translation services and sending off</p> <p>Handles opening ceremony program – invites Guest of Honour to officiate, draws up guest list, plans seating arrangements for VIPs, route for official tour of fair, reception for invited guests.</p>

Post exhibition follow-up activities would include ...

- assisting members to claim for tax rebates, if applicable
- assisting foreign participants with documentation arising from sale/disposal of their exhibits (eg. customs /excise duties/tax clearance, shipping documents, etc)
- getting participants' feedback on the organisation of the fair and perception of its success or shortcomings.

Chambers that do not have the resources to organise their own fairs could still offer services to members by co-ordinating members' participation in approved fairs. In such cases, the Chamber books an "umbrella" stand for a group of members. The services Chambers can offer in such cases are ...

- flexibility in usage of space as each individual participating member may not need an entire booth space

- savings as common cost items (such as stand design, advertising, cleaning) are shared proportionately among the participants

In the case of participation in overseas fairs, Chambers could also offer members support services such as

- sending a Chamber staff to “man” the stall
- achieving savings in travel and accommodation costs through “bulk” bookings
- applying for government funding, subsidies or tax rebates
- facilitating freight and customs clearance for exhibits
- arranging for common services such as stand display, translation, advertising.

In-house Display Centers are permanent showroom facilities

for members to showcase samples of products

to visiting businessmen.

They are also profit centers

generating rental income for Chambers

and business potentials for members.

However, they should be

professionally managed and marketed to

both the exhibitors(members) and potential trade visitors,

otherwise, they might end up as dust-collecting “white elephants”!!

Information collection and dissemination

One common service that Chambers offer their members is the collection and dissemination of information. Depending on the size and resources of the Chamber, this service can range from an information unit disseminating basic information through circulars and newsletters to a well-equipped business information center*¹⁰ with capabilities to offer “customised” and electronic information services to members.*¹¹

Collection of information could be effected through

- conducting surveys among members
- compilation of information obtained from government bodies including the country’s embassies abroad
- acquisition of published information and subscribing to the internet and information providers
- exchange of information with other Chambers in the network
- in-house research on economic issues.

Surveys are probably the least expensive way of obtaining timely information on topical issues. However, since participation in surveys is voluntary on the part of the members, it is important that the research staff obtain enough response for the survey findings to be representative.

¹⁰ This subject is discussed in detail in a ZDH/SEQUA manual on developing and operating an information service for chambers and trade associations.

¹¹ In this connection, members may be interested to know that ZDH offers a buy and sell page on their website zdh-connect.com

In this respect, the research staff might wish to bear in mind, the following pointers ...

- the covering letter should be persuasive to convince members to respond (state the objective of the survey – to gather information to support advocacy; to build up membership data-base; to identify members needs and gauge their interest in the services offered – see Annex 16 for sample of survey covering lettering and questionnaire)
- deadlines for return of questionnaires should be stated (open-dated surveys cannot be conclusive)
- questionnaires should be well structured and easy to complete (ask questions that call for simple yes or no response; for multiple choice questions, provide boxes to tick relevant answers; if seeking the degree of importance with which members view an issue, ask respondees to give weightage on a ranking of zero to five)
- give definitions of terms used in the questionnaire – eg. if the questionnaire asks for “manpower” costs, define whether they include salary, provident fund, transport and other allowances, incentive payments, payment in kind, etc
- if calculations are required, state the formula applied – eg. if the questionnaire asks for labour costs expressed as a percentage of total production costs, define what constitutes labour costs (remuneration package, payment to contract labour) and what constitutes total production costs (labour, raw materials, rents, utilities, etc)
- the questionnaire should be sent to the right department of the member’s company
- if the response rate is poor, telephone reminders to the company’s designated representative for Chamber matters are often helpful.

Dissemination of information can be effected through

- circulars, telexes and e-mails to members
- monthly newsletters
- seminars, workshops, conferences, etc.
- the operation of an electronic bulletin board system/ a website

For the information service to be useful to members, the Secretariat should “process” information for “selective” dissemination. Not all information is useful to all members at the same time. If members are inundated with general information, they may not have the time nor inclination to sieve through them and are therefore likely to overlook information which would have been useful to them. The Secretariat can provide the role of a “scanner” in this case. The in-house research unit would be in a position to identify relevant information and disseminate it to members concerned. For example, in Singapore, numerous and voluminous Government Gazettes and accompanying Acts and Subsidiary Legislation Supplements are issued at frequent intervals. Embedded in that enormous amount of legal information, are legislations and rules that have a direct impact on business operations (eg amendments to the Companies Act and consequential changes to the rules and regulations governing businesses). An individual company may not find it cost effective to subscribe to the gazettes but the Chamber should and assign a staff to keep track of such amendments and alert members concerned when necessary. A summary of important changes should be provided from time to time. Aside from disseminating basic information free of charge to members, the Chamber can also generate some income by operating a special information service (offering additional/“in-depth” information) that members can subscribe to.

Library services

Aside from information on trade and business opportunities, members are generally, interested in information on—

- laws and rules governing business operations
- foreign trade regulations such as tariff and non-tariff barriers
- sources of funding and government's subsidies and assistance schemes and trade incentives such as tax rebates
- contact addresses of exporters and importers in other countries
- country, market and product profiles
- economic statistics
- international industry and product codes and classifications
- international product standards

The library staff should encourage members as well as their colleagues in the Secretariat to make full use of the library. To enhance the usefulness of library services, the library staff should make it user-friendly by ...

- advising users on reference materials available in the library
- providing regular updates on new material available in the library. One easy way to do this is to include a library accession list (preferably with a short synopsis of the publications where relevant) in the Chamber's monthly newsletter.

Consultancy services

Some chambers are able to offer basic “in-house” consultancy services on energy conservation, environmental issues, industrial relations matters. Some rely on the varied resources of member companies to build up a pool of industrialists, technologists and professionals whose expertise and experiences could be tapped upon for consultancy when the need arises. Others, through their links with their overseas counterparts, foreign embassies and bilateral/international assistance agencies (such as ITC, ICC, ZDH and Senior Export Services of different countries, etc) are able to arrange for short-term consultancy. The job of identifying the area of expertise required and putting up a project proposal could be assigned to an industry officer, research personnel or training staff of the Chamber.

Training services

Training is one area where Chambers can offer a useful service to members and generate revenue for themselves. Chambers with a wide membership base have a “captive” market for their training services. While the smaller Chambers may package training in the form of talks, seminars and workshops, the larger Chambers may well consider setting up a training center within the Chamber. Talks, seminars and workshops could be organised by an industry officer as an industry group project/activity. In this connection, the officer is expected to identify a topic that is of interest to the industry group; invite a speaker who is authoritative on the subject; negotiate trainer’s fees (if applicable) draw up a project budget for the committee’s approval; reserve a venue for the talk or seminar; invite participation, collect participation fees; and make arrangements for catering, availability of equipments and handouts.

If the Chamber should decide to set up a training center*¹² the Secretary-General should initiate a feasibility study and then submit the proposal for the Board's approval as this is a major and long term commitment.

The training center should be professionally managed and operated as a profit rather than a cost center and the center director should be responsible for

- setting up the center (acquire training facilities, equipments. etc)
- identifying the training needs of members
- developing training programmes
- recruiting and managing training staff
- overseeing the marketing and costing of training courses
- ensuring the viability of the center
- evaluation and follow-up of training.

Networking

Networking pertains to establishing and developing social and business relations with useful “contacts” which may be individuals, government or business organisations.

At the Chamber's level, this translates into forging strategic alliance with local and foreign business organisations, other Chambers of Commerce and Industries, Trade Associations, other service providers, universities, training institutions and government organisations and agencies.

¹² This subject is discussed in greater detail in a ZDH/SEQUA “Manual on developing a training centre within a chamber or trade association”.

For the members of the Chambers, useful contacts would include fellow member companies and other business organisations that would be potential business partners/associates, customers or suppliers, political decision makers, Ambassadors, Trade Commissioners, businessmen, industrialists, professionals, academicians, technocrats, etc.

Chambers that draw their membership from a wide spectrum of industries, are well placed to provide networking opportunities for their members. They could do this through organising ...

- talks, seminars and conferences
- discussion groups
- social functions
- sports events

Talks, seminars and conferences can be organised on a regular basis (monthly or bi-monthly). They can be a source of income for the Chamber as well as an avenue for Chambers to keep members up-dated on issues of topical interest.

Discussion groups may take the form of ad-hoc / once-off meetings or regularly scheduled informal gatherings. They may comprise members from the same industry sector *or* with the same professional background (eg.marketing) *or* with a common agenda to pursue (eg. promotion of e-commerce).

Such groups' activities should be self-financing and the Secretariat's role in these discussion groups would probably be limited to informing relevant members of meetings being convened, providing the venue and arranging refreshments, if so requested.

Social functions should also be self-financing or even revenue generating. A popular activity in this category is the annual dinner. Since the intention is usually to get the general membership involved, this project falls under the ambit of the Membership Committee and the officer in charge of membership matters takes care of planning and marketing the event. A checklist of the tasks involved is in annex 17.

Sports functions such as golf and soccer tournaments are often well supported by enthusiasts. It is also relatively easy for Chambers to get members to donate prizes. Since the organisation of such events calls for knowledge of the sport involved, it is pertinent to appoint a member with the necessary background to be the tournament director and to guide the Secretariat staff entrusted with the job of organising the event.

Some Chambers organise social and sports functions to generate supplementary income for themselves. These functions also provide members with excellent opportunities for members to interact informally with government and embassy staff. Such networking can prove very useful to members when they have cause to dialogue with a government department or ministry or foreign embassy and need a friendly contact point to gain access.

Advocacy

Members generally look to the Chambers to provide leadership to advocate for a conducive business environment. The Chamber's role in this respect could be

- pro-active in advocating for government measures that will enhance members' competitiveness on the domestic and international front, *or*,
- re-active in providing feed-back to government on the impact of government policies/legislations affecting business operations.

The research division in the Secretariat should be geared to prepare presentations to request government to introduce policies and legislations that will enhance members' competitiveness. In the course of their on-going monitoring of prevailing economic conditions, the research staff may anticipate potential problem areas such as shortage of unskilled labour in an industry sector; adverse impact on trade due to inhibitive non-tariff measures adopted by a major market; or recessionary trends affecting companies' profitability. The research department could collect pertinent data from members (through survey or discussions) and prepare position papers for the Chamber's Board of Directors or relevant Industry Committees to present to the government. Examples of issues that could be raised include discussions on ...

- the government's employment policy relating to "imported" labour
- bilateral trade arrangements
- government taxes and levies or developing export financing/assistance schemes, etc.

Smaller Chambers that do not have in-house research capacity should “out-contract” research work as solid data are a pre-requisite for effective advocacy.

When the government intends to introduce new legislations affecting business operations, Chambers can provide the means for the government to obtain feedback on the potential impact of their policy changes.

The Chambers are in a good position to get together, leading businessmen and industrialists to deliberate policy issues with the government with a view to developing legislations that would create a favorable business climate. In this respect, tripartite councils comprising representatives from government, labour and employers have been found to be effective in developing wage guidelines in Singapore.

In other countries (eg. Thailand and the Philippines) government bodies and chambers, both at national and regional levels, meet regularly in development committees/councils to discuss economic issues. Such an institutionalised public-private partnership dialogue helps to ensure favorable economic growth conditions.

Chambers can also assist statutory boards and public bodies to identify suitable individuals to serve on their boards or committees (to achieve such a participating role is also an issue for advocacy itself).

In nominating members for board or committee positions in the public sector, the Chambers fulfil the dual role of ...

- helping the authorities ensure that they have private sector inputs in their deliberations
- ensuring that members have a say in shaping policies or setting standards that will have impact on their businesses. In addition, members may regard such public appointments as enhancing their standing in the community.

Examples of such placements are ...

- appointment of businessmen on the boards of Trade and Economic Development Boards
- appointment of Chamber representatives on product standards committees.

Other activities and services

Some Chambers also offer miscellaneous office services at special rates to members eg. translation services, employment exchange, temporary office personnel, etc*¹³.

¹³ A more comprehensive coverage of this subject is contained in two ITC/ICC/ZDH publications entitled "Income-generating activities of Chambers of Commerce" and "Chambers of Commerce – services to small and medium-sized enterprises" by ITC/ICC/ZDH and a SEQUA publication entitled "Income from Services".

CHAPTER FIVE

PLANNING, REVIEW AND EVALUATION

“SWOT’ exercises and work plans

It is recommended that the Board of Directors should, as soon as is feasible after taking office, convene a meeting to carry out a “SWOT” exercise and based on this, develop its annual work plan.

“SWOT”

is the acronym for strength, weaknesses, opportunities and threats. To equip itself to chart the course of the Chamber, the Board must first familiarise itself with the

- *strength* of the Chamber (eg. regarding autonomy, status, scope of services, etc)
- its *weaknesses* (eg. low income, low membership, etc)
- the *opportunities* available to it (eg. growing number of SMEs, international networks, etc)
- the *threats* it faces (eg. competition from other service providers, losing members’ to associations, etc).

Annual work plan – when it has completed its “SWOT” exercise, the Board is in a better position to draw up its annual work plan. It is through the work plan that the Board conceptualises its vision for the Chamber and translate this into a set of *goals* for the Board members and Secretariat to pursue. It is thus essential to formulate quantitative

and qualitative targets (objectives) in order to give the work plan precision and to allow proper monitoring.

Some examples of precise targets are ...

- to increase membership by 20% by the end of the year
- to act on business enquiries within 48 hours
- to cut down on staff turnover (losing not more than qualified staff per annum)
- to raise income from services by 20% per annum

Less precise targets (eg. increase services) do not give sufficient guidance and cannot be used for monitoring progress.

When formulating targets, care must be taken that they address ...

- **quality** issues *and*
- **quantity** issues *and*+-
- refer to a **time** frame.

The above is in management literature, referred to as **QQT** requirement.

The various committees would further define the work that they have to undertake in view of the overall work plan and then come up with the respective committee workplans.

The work plan should incorporate ...

- precise targets/objectives
- *an activities plan* with clear priorities which envisages the activities the Chamber should undertake and the services it should offer, in order to attain its goals

- *an operations plan* that ensures a systematic and organised approach to setting the activities plan into action (defines responsibilities, time frame and manpower requirements)
- *a marketing plan* to “sell” the ideas, activities and/or services to the “target market” (ie. the members, government, other business organisations or chambers, etc)
- *a financial plan* to project income and expenditure arising from such operations.

Membership, services and finance are the three key areas of fundamental importance to a Chamber, hence it is common for a Board of Directors to focus on building up the Chamber’s membership base, increasing services and enhancing finances as the main thrusts of its work plan.

Membership Development*¹⁴

Building up and maintaining a strong membership base is practically a “bread and butter” issue for a Chamber and it is to be expected that a newly formed Board of Directors will accord priority to this matter.

The following hypothetical scenerio illustrates how the mechanism of the work plan is set into motion ...

Stage 1 : Target setting

The Board of Directors includes in their work plan, a target of increasing membership by 10% by the end of the prevailing financial year.

¹⁴ A more in-depth discussion of the subject can be found in two ZDH/SEQUA manuals on “Strategies for membership recruitment and retention for Chambers of Commerce and Industry” and “Attracting new members/membership administration”.

Stage 2 : Planning

The operations and activities plan envisages the following strategies to achieve this target ...

1. Launch a year-long membership drive to recruitnew members
2. Enhance value of membership to retain existing members (not losing more than 5% of existing membership)

The year-long membership drive could incorporate the following activities ...

- Introduce a “member-get-member” programme whereby existing members companies are offered a waiver of 25% of their annual membership dues for every new member they recruit (provided that the new member signs up for at least 6 months’ membership). Expected result new members
- organise a series of “road shows” to introduce the Chamber’s services and facilities to potential members – this could take the form of a week-long roving/mobile exhibition to be held at quarterly intervals at selected hotels/conference halls in the industrial and commercial sectors. Expected result new members.
- organise an “open-house” programme to give interested parties an insight into the operations of the Chambers. This could be held at bi-monthly intervals for up to 50 guests per event. Expected result New members.
- organise “sector specific” programmes targetted at attracting new members from selected sectors. Examples of these events include ...

- a talk on the implications of the Government's annual budget for the manufacturing sector
- a seminar on the development of Small and Medium-sized Enterprises, etc.

Expected result new members.

To ensure membership growth, the Chamber would have to retain members as well as recruit new ones. In this respect, the operations and activities plan could include the following measures for membership development ...

- launch a “member-to-member” system*¹⁵ to enhance value of membership – get member companies to offer price discounts to fellow member companies of the chamber (restricting this privilege to members only would also offer an incentive for non-members to join the chambers)
- set up an affiliate credit card tie-up with a leading bank whereby the CEOs of member companies are offered a waiver of entrance fees and 5 years subscription to the bank's credit card scheme
- extend the range of existing services – eg. set up a training center*¹⁶ (if one is not already in place) by year end.

Expected result of the above measures – a% drop in attrition rate in membership arising from resignations.

The Secretary-General “ should conduct a brain-storming session” on membership development and retention with the heads of the various divisions in the

¹⁵ Information on this can be obtained from a ZDH/SEQUA manual entitled “Attracting new members/membership administration”

¹⁶ Details of how to go about doing this can be obtained from a ZDH/SEQUA manual on “Developing a Training Centre within a Chamber or Trade Association”.

Chamber to assess the practicality of the activities and to collectively, work out a budget needed to implement the various programmes.

Stage 3 : Endorsement of plans

The Secretary-General sets up a joint meeting of the Membership and Finance Committee to discuss the proposed programme of activities and budget requirement envisaged. If these are approved by the two committees at the joint meeting, the Secretary-General can then submit the plans and budget to the Board of Directors for their endorsement.

Stage 4 : Implementation of plan

To market the various programmes, the Secretary-General assigns tasks to various division of the chamber as follows ...

- the research division to identify a mailing list of potential members at the beginning of the year. (Subsequently, monthly updates should be done based on information from the registrar of companies, licensing authorities, etc).
- the PR division to develop a suitable marketing kit and exhibits (posters, photographs, etc) for the “road shows” and “open-house” events
- the membership division to send out a hundred letters of invitation followed by telephone contacts (a week after sending out the letters) to seek appointments with the management of the target companies
- the various heads of divisions to prepare briefs on their respective divisions’ activities for presentation at the “open-house” sessions
- the business development division to work out details of the “member-to-member” and “credit card tie-up” schemes with the relevant parties concerned.

Financial Planning

In the context of Chambers of Commerce and Industry, financial planning would likely encompass _____

- forecasting present and potential income
- projecting expenditure
- managing funds and cash flow.

Sources of income include ...

- membership entrance fees and subscriptions
- rentals (of property, conference/meeting facilities, display centers, equipments)
- income from certificates of origin and other documentary services
- revenue from projects and income from trade exhibitions, publications, secretarial services, etc
- management fees (trade missions, conferences)
- participation fees for talks, workshops, seminars, training courses
- levies for special arrangements (eg. the Chamber may receive a “goodwill” payment for lending its name to a fair organised by an exhibition company to lend prestige to the fair; charges for allowing approved commercial companies to “piggy-back” their brochures, leaflets and other advertising material in the Chamber’s mail to members. These special arrangements

should be carefully considered before they are undertaken as some of these may taint the image that the Chamber projects to its members)

- Income from social functions and sports events
- donations from members
- subsidies from government, etc.

Revenue-generation is important for the survival of a Chamber. However some basic services such as trade referrals, listing in the Chamber's directory of members, secretarial support for meetings, etc are expected to be rendered without charges to members: otherwise there will be no "perceived membership benefits" and this would have an adverse impact on membership retention and recruitment.

In cases where subscriptions are the main source of income, the Chambers will have to be diligent in building up their financial reserves because in a recession, membership attrition can be quite serious and the chambers must have adequate reserves to see them through the lean times. Chambers could consult their members in the banking and finance sector on the advisability of investing their reserve funds in properties, government bonds or even stocks and shares.

Cash flow is another area where planning is relevant. It is common for chambers to collect subscriptions on a bi-annual or annual basis, hence they are likely to be cash-rich in the months the subscription invoices are sent out (and paid) and cash strapped in other months. This should be taken into consideration when the Chamber plans its expenditures eg. if it is purchasing expensive equipment, it might wish to do so in the months when cash in hand is at peak. The Chamber may want to influence the time of payment of fees by offering discounts for early settlement.

Collection of subscriptions and other dues from members present another problem for a Chamber. While it cannot afford to carry a large bad-debt position, it also cannot afford to offend members by initiating litigation to recover outstanding dues. Some chambers circumvent this problem by factoring out their dues.

Planning in other areas

Membership and finance are not the only areas where planning is relevant. Chambers should also plan their organisation structures, trade development activities, training centers, information services, publications and public relations, etc. Reference to such planning has been incorporated in the preceding chapters.

Reviews, evaluation and follow-up actions

To ensure that plans are implemented on schedule, it is essential to develop a comprehensive system to monitor progress. For example, when organising a program, there is a myriad of details to co-ordinate to ensure its success. A good checklist of the actions to be taken would be most helpful to keep track of progress in implementation of plans^{*17}.

¹⁷ In this respect, the Federation of Karnataka Chambers of Commerce and Industry in India has developed a practical set of program monitoring forms for the guidance of its officers and these are reproduced in Annex 18

Planning, review and evaluation are essential contributory factors to the success of all Chamber activities and it is recommended that they be adopted as fundamental principles in organising and managing any Chambers of Commerce and Industry. To reiterate ...

Planning is a requisite to all systematic and organised actions

to achieve optimum use of time and resources

and efficient attainment of goals.

Regular periodic **reviews** of progress are essential to ensure that

implementation of plans is on-course

changes in circumstances are recognised and

appropriate adaptations to, and modifications of plans are effected.

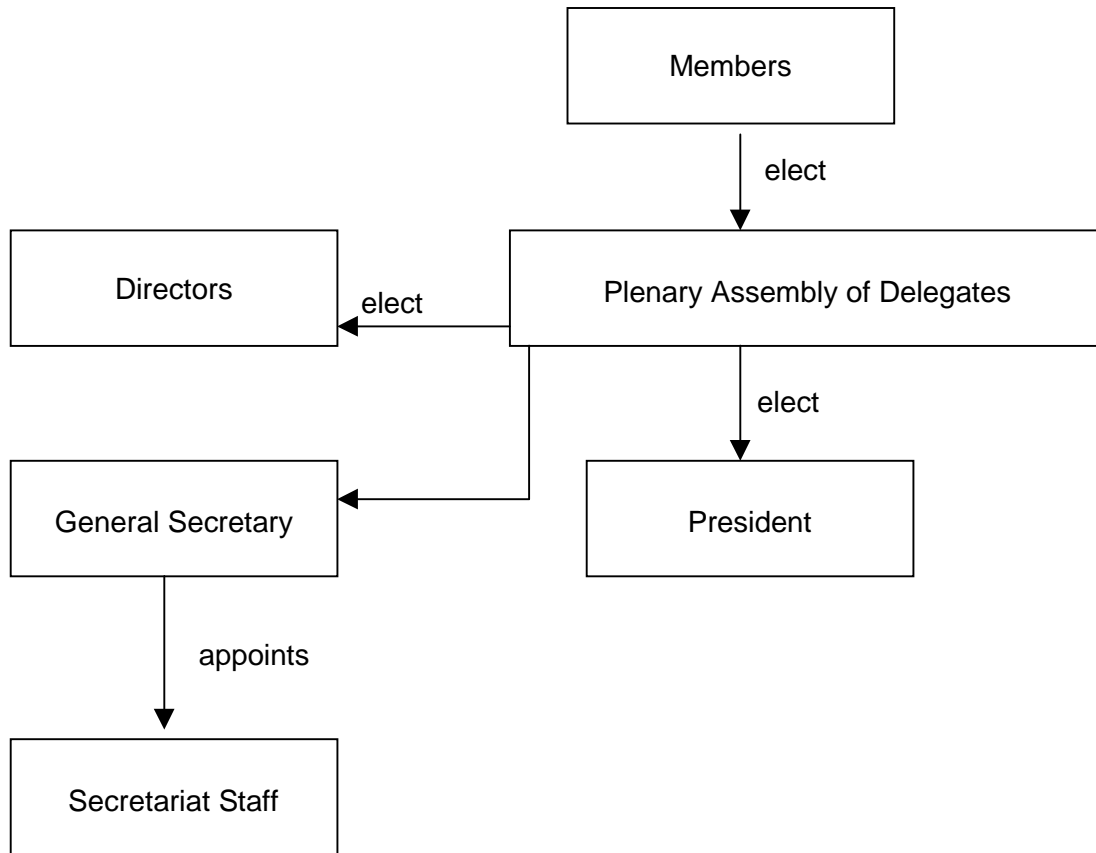
Evaluations are helpful to

confirm achievement of results

analyse the quality of planning and implementation

guide future planning and activities.

ANNEX 1: ORGANISATION STRUCTURE OF GERMAN CHAMBERS



Source: Mr Heiko G Waesch, Regional Co-ordinator, ZDH Partnership Program

ANNEX 2 : SAMPLE OF A COMMITTEE'S REPORT TO THE BOARD

COMMITTEE : Membership Committee

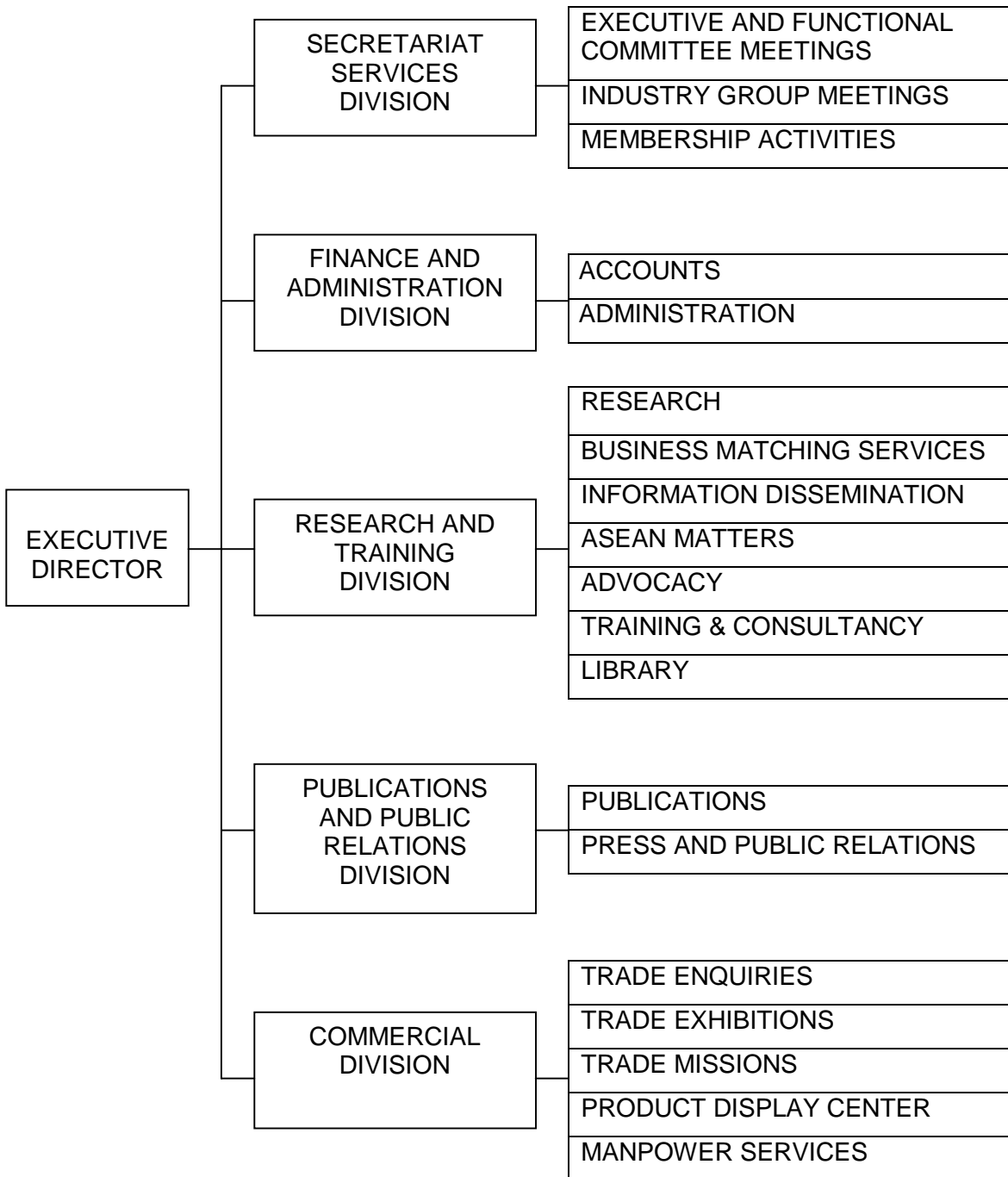
MET ON : 10th January, 2000

MAJOR ISSUES DISCUSSED	DECISIONS REACHED

PROGRESS REPORT ON ON-GOING PROJECTS

Project	Action area	Status
Membership Drive	<ul style="list-style-type: none">marketing kit	brochures in print applications forms printed
	<ul style="list-style-type: none">open-house programme	scheduled for 20/1/2000 invitations sent out to 80 companies
Review of Membership fees	<ul style="list-style-type: none">survey of comparative fee structure of other service providers	on-going
	<ul style="list-style-type: none">joint meeting with Finance Committee to discuss changes	Scheduled for 19/2/2000

ANNEX 3 : SECRETARIAT ORGANISATION CHART



ANNEX 4 : JOB SPECIFICATIONS FOR MEMBERSHIP DIRECTOR

JOB TITLE : Membership Director

RESPONSIBLE TO : Executive Vice President

FUNCTION :

The Membership Director shall plan, coordinate and conduct activities to ensure and increase the Chamber's membership and financial support and conduct membership-relation programs and membership drives when called for by the Board of Directors, Executive Committee and/or the Executive Vice President.

DUTIES AND RESPONSIBILITIES :

He or she shall be responsible for providing a program of overall financing of Chamber of Commerce activities, to include membership building and soliciting new members to offset unavoidable losses and to increase the overall membership of the Chamber. The Director shall provide a continuous reevaluation of membership investment so that the Chamber's investment is compatible with the growth of the Chamber and of the community. He or she shall work to secure adoption of the Chamber's investment formula, as the members minimum annual support.

The Membership Director will consult with members and refer complaints and problems to the appropriate Chamber departments and will assist members in the selection of committee assignments. The Director shall encourage participation and develop continuous programs of membership education and information through Chamber meetings, Coffee Clubs, Chamber's news releases and Chamber publications.

The Director shall serve as secretary to the Membership Service and Development Committee and organize any and all membership campaigns when called upon to do so. He or she shall develop and maintain a system for identifying prospective new members and plan and prepare "sales" literature for mailing to prospects. The Membership Director will set up and maintain membership records, supervise the secretary, dictate letters, reports and minutes and special bulletins pertaining to membership procurement.

CONTACT WITH OTHERS :

The Membership Director will have continuing and extensive contact with business representatives and Chamber members. He or she will also have frequent contact with other staff members.

Source: Putting it all together ... in a procedures manual prepared by the Chamber of Commerce of the United States.

ANNEX 5 : JOB SPECIFICATIONS FOR MANAGER, INDUSTRIAL DEVELOPMENT

JOB TITLE : Manager, Industrial Development

RESPONSIBLE TO : Executive Vice President

FUNCTIONS :

Develop and supervise: plans and procedures to ensure a continuous and up-to-date effort in new and existing business development activities; an annual budget for support of department activities; procedures for increasing the economic base of the _____ area by expansion of existing and procurement of new business and industry, to include elements of the service industry. Direct the staff members of the Business and Industrial Development Department in performance of their normal and additional duties. Supervise distribution of demographic and economic data to potential new businesses and indigenous businesses. Assist in the development and supervise implementation of an annual Program of Work for the Department.

DUTIES :

Receives inquiries, by all communication means, pertaining to business development.

Assigns to member of the department for follow-up or makes personal follow-up.

As assigned staff member of committees, takes minutes of meetings and assists in conduct of meetings as requested by committee chairmen.

Contacts individuals by telephone, mail or personal visits, in business firms and determines how _____ fits into their future plans.

Interviews candidates for positions with the Business and Industrial Development Department.

Makes recommendations to the Executive Vice President.

Writes quarterly and annual reports of the department performance.

SPECIAL DUTIES :

Coordinator, Industrial Development Committee.

Source: Putting it all together ... in a procedures manual prepared by Chamber of Commerce of the United States.

ANNEX 6 : JOB SPECIFICATIONS FOR MANAGER, PUBLIC RELATIONS

JOB TITLE : Manager, Public Relations

REPORTS TO : Executive Vice President

FUNCTIONS :

Develop and supervise: all public relations and publicity programs aimed principally at gaining optimum membership support and public acceptance of the Chamber's programs; plans for improving the image of _____ locally, state-wide and nationally; files visual aides pertaining to people and activities related to the Chamber's program.

Develop and supervise implementation of an annual budget for support of department operations.

Advise other departments of the Chamber: in public relations aspects of their activities and methods for gaining greater public and membership support: in the preparation of literature for distribution to Chamber members and others.

Coordinate: all Chamber-called news conferences; and edit publication of the Annual Report, Program of Work _____ and _____ .

Assist in: the staging of ground breaking and grand opening ceremonies; in transmitting information to government officials; planning, promoting and supervising special Chamber events.

Supervise the use and maintenance of all audio-visual tapes, cameras and related equipment of the Chamber.

DUTIES :

Write letters to newly designated government, business and Chamber of Commerce officials, offering congratulations and assistance.

Receive copy for inclusion in Chamber publications, edit and publish.

Write articles about the _____ area for distribution to state and national magazines and other publications.

Write and maintain informational literature designed to answer inquiries about the _____ area.

Serve as photographer for functions of the Chamber.

Write and maintain current audio-visual presentations of the Chamber.

SPECIAL DUTIES :

*Coordinator, Public Relations Committee

*Coordinator, Image Projection Committee.

Source: Putting it all together ... in a procedures manual prepared by the Chamber of Commerce of the United States.

ANNEX 7 : SAMPLE OF A STAFF ASSESSMENT FORM

Employee Performance Evaluation																
EMPLOYEE _____	RATING DATE _____															
CLASSIFICATION _____	EMPLOYMENT DATE _____															
DEPARTMENT _____	RATED BY _____															
FINAL NUMERICAL SCORE _____	REVIEWED BY _____ DATE _____															
PERFORMANCE RATING _____	REVIEWED BY _____ DATE _____															
<p>Insert proper numerical rating value in space to the right of rating factor and add vertically to determine score for various sections.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;">OUTSTANDING</td> <td style="width: 5%; border: none;">/</td> <td style="width: 45%; border: none;">4</td> </tr> <tr> <td style="border: none;">Rating Values</td> <td style="border: none;">{</td> <td style="border: none;">ABOVE SATISFACTORY 3</td> </tr> <tr> <td style="border: none;">All Sections</td> <td style="border: none;">{</td> <td style="border: none;">SATISFACTORY 2</td> </tr> <tr> <td style="border: none;"></td> <td style="border: none;">{</td> <td style="border: none;">CONDITIONAL 1</td> </tr> <tr> <td style="border: none;"></td> <td style="border: none;">{</td> <td style="border: none;">UNSATISFACTORY 0</td> </tr> </table>		OUTSTANDING	/	4	Rating Values	{	ABOVE SATISFACTORY 3	All Sections	{	SATISFACTORY 2		{	CONDITIONAL 1		{	UNSATISFACTORY 0
OUTSTANDING	/	4														
Rating Values	{	ABOVE SATISFACTORY 3														
All Sections	{	SATISFACTORY 2														
	{	CONDITIONAL 1														
	{	UNSATISFACTORY 0														
<p>SECTION I:</p> <p style="text-align: center;"><u>GENERAL QUALITIES</u></p> <p>APPEARANCE _____</p> <p>COOPERATION _____</p> <p>INITIATIVE _____</p> <p>PUNCTUALITY _____</p> <p>INTEGRITY _____</p> <p>DEPENDABILITY _____</p> <p style="text-align: right;">TOTAL _____</p>	<p>SECTION II:</p> <p style="text-align: center;"><u>WORK PERFORMANCE</u></p> <p>WORK QUALITY _____</p> <p>WORK QUANTITY _____</p> <p>JOB KNOWLEDGE _____</p> <p>ORGANIZATION OF USE OF TIME _____</p> <p>JUDGEMENT & REASONING _____</p> <p>ACCEPTS RESPONSIBILITY _____</p> <p style="text-align: right;">TOTAL _____</p>															
<p>SECTION III:</p> <p style="text-align: center;"><u>RECAPITULATION</u></p> <p>Score from Section 1 divided by 2 = _____</p> <p>Score from Section II _____</p> <p style="text-align: center;"><u>TOTAL SCORE ALL SECTIONS</u></p>	<p style="text-align: center;"><u>PERFORMANCE RATING</u></p> <p>32 & Above Outstanding</p> <p>24 – 31 Above Satisfactory</p> <p>16 – 23 Satisfactory</p> <p>9 – 15 Conditional</p> <p>0 – 8 Unsatisfactory</p>															
<p>Comments & Observation required when overall performance rating is other than satisfactory</p> <p>_____</p> <p>_____</p> <p>_____</p>																
<p>EMPLOYEE'S SIGNATURE</p> <p>_____</p>																

Source : Hyers & Katz's Portfolio of Business Forms.

ANNEX 8 : SAMPLE OF EMPLOYEE REQUISITION FORM

Employment Requisition	
Dept. _____	Job title _____
Date needed _____	Starting salary _____
Permanent <input type="checkbox"/>	Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Hours/Week _____
Temporary <input type="checkbox"/> until _____	Exempt <input type="checkbox"/> Non-Exempt <input type="checkbox"/> Union <input type="checkbox"/>
Replacement	Addition to Payroll
Replacement for _____	Justify need: _____
<input type="checkbox"/> Resigned <input type="checkbox"/> Terminated	_____
<input type="checkbox"/> Transferred to _____	_____
Final salary _____	_____
Qualifications	
High school years _____	Typing (wpm) _____
College years _____	Shorthand (wpm) _____
Professional degree _____	
Other _____	
Other qualifications _____	
Job Summary	

Suggested in-house candidates for position :	

_____	_____
Dept. Head Signature, Date	Division Head Approval, Date

Source : Hyers & Katz's Portfolio of Business Forms

ANNEX 9 : SAMPLE OF AN OVERTIME PERMIT FORM

Overtime Permit

Dept _____ Date _____

Name _____

is authorized to work _____ hours overtime

on _____ project for _____

Requested by _____ Approved by _____

Source : Hyers & Katz's Portfolio of Business Forms.

ANNEX 10 : SAMPLE OF A TRAVEL REIMBURSEMENT FORM

STAFF TRAVEL REIMBURSEMENT FORM

NAME OF STAFF _____

JOB TITLE _____

DIVISION/DEPARTMENT _____

ASSIGNMENT (eg. Trade Mission, Conference, etc) _____

DATES : From _____ **to** _____ **inclusive.**

EXPENSE ITEMS	AMOUNT SPENT IN __\$
Airfare*	_____
Trainfare*	_____
Car rental*/ taxi fares	_____
Transfers (from residence to airport & vice-versa)	_____
(from airport to hotel and vice-versa)	_____
Airport taxes*	_____
Visa fees*	_____
Hotel*	_____
Meals (breakfast, lunch, dinner)*	_____
Laundry*	_____
Official telephone & other communication expenses*	_____
Registration fees and other official charges*	_____
Entertainment expenses*	_____
Loss in currency conversion	_____
Total	=====

Signature & date : _____ **(* receipts attached)**

ANNEX 11 : SAMPLE OF INVITATION TO QUOTE AND TENDER FORMS

Request For Quotation				
Purchasing Department : _____				
Original of this quotation must be at the above address by _____ (date)				
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	Inquiry no _____ Date _____ For information concerning this Quotation, please contact : _____			
Date required _____ Telephone no _____				
Quantity	Item and Description	List Price	Net Price	Unit
THIS IS NOT AN ORDER				
This inquiry implies no obligation on the part of the buyer. If substitutes are offered, make full explanation. We reserve the right to reject any or all bids and/or to accept the most attractive offer.				
By _____ Authorized Signature		By _____ Seller's Signature		

Source : Adapted from Hyers & Katz's Portfolio of Business Forms

Tender form

Annual contract for printing and supply of the following items

Items	Competitive Price for Quantity							Delivery time required from date of order
	200	500	1000	1200	5000	20,000	*Any other	
Invitation cards								
Invitation covers								
Folders (1000)								
Manila window covers 9x4 (5000)								
White covers 9x4 (5000)								
Manila covers 9x4 (20,000)								
Visiting cards								
Letter heads								
Cobra spring files (1200)								
Craft covers 12x10 (5000)								
Scribbling pads (5000)								

*Quantity for letter heads to be specified in the any other column. The quantity required for each item is indicated in bracket. For invitation cards and covers, quote rates for the various quantities mentioned.

Matter to be printed :

_____ logo and address for all the above items.

For invitation cards, matter as and when required.

Name of Company : _____

Address : _____

Contact person : _____ Tel : _____ Fax : _____

Source : Federation of Karnataka Chambers of Commerce and Industry (India).

ANNEX 12 : SAMPLE FORMAT FOR RECORDING AGM MINUTES

MINUTES OF THE ANNUAL GENERAL MEETING OF _____ (NAME)
CHAMBER OF COMMERCE AND INDUSTRY HELD AT _____ (ADDRESS)
ON _____ (DATE AND TIME) .

PRESENT : (List name of President, Vice-President(s) Honorary Presidents and other office bearers co-chairing the meeting, followed by an alphabetical list of names of attendees and proxies and the member companies they represent).

The Secretary-General called the meeting to order at x.xx pm. The President welcomed members to the Annual General Meeting and proceeded with the agenda convening the meeting.

1. President's address

The President gave a review of the Chamber's activities for the past year and highlighted the following salient points in his opening address:

- Overview of the economy in the year in review
- Rising cost of doing business
- New initiatives in membership services and activities introduced in the year in review
- New strategic alliances forged during the year

The President thanked members for their feedback and continued support. He placed on record his appreciation to the Board members and Secretariat staff for their co-operation and commitment to their work.

2. To confirm the minutes of the Annual General Meeting held on _____ (date)

The minutes of the Annual General Meeting held on (date) having been circulated with the agenda were taken as read. The minutes were confirmed without amendments on a motion proposed by Mr.X representing XYZ Company and seconded by Mr. A representing ABC Company. The motion was unanimously carried.

3. To receive and, if approved, pass the Annual Report and Audited Accounts for the year ended 31st December 19xx

The Annual Report and Audited Accounts having been circulated with the agenda, were taken as read and noted. The President invited comments and questions from the members present.

(Record here, comments and questions raised and explanations, clarifications and replies supplied by President and/or the panel of office bearers co-chairing the meeting – eg. questions fielded on the accounts are often taken up by the Chairman of the Finance Committee. In the minutes, the names of the individuals who raise the comments/questions and the companies they represented should be recorded).

There being no further comments or questions, the President put the motion for adoption of the Annual Report and Audited Accounts. The motion was carried on the proposal of Mrs. B representing XXX Company, seconded by Mr. C representing ZZZ Company.

4. To appoint auditors for the ensuing year

The meeting unanimously re-appoints Messrs. (name of audit firm) as the Chamber's auditors for the next financial year on the proposal of Mr. D representing AAA Company and seconded by Ms. E representing BBB Company.

5. To transact any other business (of which notice in writing has been received by the Secretary-General by 5pm on xx.xx.19xx).

The President informed the meeting that the Secretary-General has received notice from Mr. F representing CCC Company to table the following matter for discussion:

(Record here, matter for discussion)

He invited Mr. F to speak on the matter

(Record here discussion and resolution taken on the matter, if relevant. This is one instance where voting may be called for and the minutes should indicated

- whether voting was carried out by secret ballot or show of hands
- number of votes counted for and against the motion
- whether the resolution was passed or rejected)

6. Announcement of result of election of Board members

At the invitation of the President, the Chairman of the Election Committee read out the names of the members elected to the Board of Directors. They are ...

(List here the names of the individuals and the member companies they represent)

As there were no other matters for discussion, the President declared the meeting closed. He thanked members for their attendance and invited them to proceed to the reception at the Chamber's premises. On behalf of the meeting, Mr. G of NNN Company recorded a vote of thanks to the President for chairing the meeting and the Board of Directors for their dedication and commitment to the Chambers during the year under review.

ANNEX 13 : SAMPLE OF AN AGENDA FOR A BOARD OF DIRECTORS' MEETING

MEETING OF : BOARD OF DIRECTORS

DATE :

TIME :

VENUE :

AGENDA

ITEM	ACTION
1. To confirm minutes of the previous meeting held on xx.xx.xx	Minutes attached as Appendix 1
2. To discuss matters arising from previous meeting – (a) on MOU with XYZ Association (b) on purchase of land adjoining chamber's premises (c) on status of survey on "Cost of doing Business"	President to report Chairman, Finance Committee to report Secretary-General to report
3. Matters for decision – (a) on setting up a Training Center (b) on trade and investment mission to Australia (c) on Chamber's 50 th Anniversary celebrations program	Details in Appendix 2 Details in Appendix 3 Details in Appendix 4
4. Matters for discussion – (a) feedback to government on wage guidelines (b) delegation to Asean-CCI meeting in Vietnam	Details in Appendix 5 Details in Appendix 6
5. Any other matter	

ANNEX 14 : HOW TO ORGANISE A TRADE MISSION

Step I

about 6 months ahead of time

1. Getting an overview of trade missions which other institutions in your country/city will organise in the near future and ascertaining the possibility of a joint mission.
2. Identifying relevant target countries/regions and target groups for the mission in your country (chamber members only, or non-members also?)

More marketing activities are necessary if non-members are included as potential participants.
3. Determining the purpose of the mission, e.g.:
 - Learning more about the country as investment location
 - Finding trade partners etc.

Step II

About 4 – 3 months ahead of time

Check demand for a trade mission to a particular country of your target group.

1. Conducting a written survey or interviews among the Chamber members in order to confirm the choice of the target country
2. Organising a promotion about the selected country/region

- inviting representatives of the chamber and/or other business organisations of the target country to provide information on the business environment of this country.
 - providing interested companies with material/information on the target country, if possible, including a list of business opportunities and/or potential business partners (making use of all sorts of sources of information Internet etc.)
3. Publishing an article in your 'Chamber News'-magazine on the target country and encouraging readers to provide feed-back.

Step III

About 2 months ahead of time

Preparing a trade mission implies parallel activities in your home country and the target country of the mission. While a detailed programme is being worked out involving partners in the target country, **the potential and confirmed participants of the trade mission in your home country have to be kept constantly informed about the ongoing preparations in order to keep them enthusiastic about the upcoming event.** Doing so avoids cancellations of early bookings which is very likely with business people who have to travel frequently on their own anyway.

Remember: 'Feed' participants continuously with more and more information on the planned trade mission – step by step.

1. Setting time and duration of the mission. Consider:
 - Important events that take place at home which might prevent business people from participating in the trade mission
 - Events that take place in the target country which might be attractive for the trade mission agenda (e.g. exhibition, conference)
 - Public holidays in the target country
 - Flight/transport schedules
2. Fixing the rough outline of the programme
 - Looking for a good (partner) travel agent to suit your particular needs with regard to the target country and the potential group size
 - Getting first quotations in for the route (flights, transport, hotel accommodation, travel requirements (visa), organisation fees on the other side etc.)
3. Identifying and approaching your best contact partners in the target country
 - Your country's diplomatic representation
 - Chamber of Commerce/Industry/Federations etc.
 - Trade Promotion Boards, Investment Boards etc.
 - Ministry of Trade/Industry etc.

Step IV

Preparations

'Here' (your home country)

- Arrangements via Travel Agency (Flights, Hotels, Transport from Airport to Hotel)
- Consider: location of the hotel etc.
- Providing participants with more information and getting more information from them

- Preparation seminars for the participants with e.g. the Chamber of Commerce of the target country. Make sure that you know:
 - which industries the potential mission members are in?
 - which partners in the target country are mission participants looking for? – important for arranging meetings with relevant businessmen
 - which particular interest do they have in the target country – trade/investment, etc.?
- so that the preparation meeting can already be very focussed.

'There' (the target country)

- pre-mission, by one representative of your chamber
- approach the following for support and arrangements
 - Embassy/Consulate: briefing/reception
 - Chambers of Commerce: Business meetings
 - Governmental agencies for official talks (via Embassy)

Remember: Time is a crucial factor (visa applications, bookings etc).

Source: the Delegate of German Industry and Commerce in Singapore.

ANNEX 15 : SAMPLE INFORMATION SHEET FOR MEMBERS HOSTING A VISITING TRADE MISSION

CIRCULAR TO : (List names of member companies)

REGARDING : MEETING WITH TRADE MISSION FROM XXX (name of country of origin of mission)

DATE & TIME :

VENUE :

Thank you for indicating your interest in meeting the trade mission from XXX. The Secretariat has collated the following data that may be of use as background information.

Leader of Trade Mission : Mr.

Composition of Trade Mission ...

Mission Member	Name of Company	Products/Services of Company

Leader of our Chamber's delegation to meet the trade mission : Mr.

Composition of our Chamber's delegation ...

Host Member	Member company	Products/Services of Company

Bi-lateral Trade between our country and XXX in the last three years

YEAR	TRADE IN US\$ millions		
	IMPORTS	EXPORTS	RE-EXPORTS
1997			
1998			
1999			

Major Imports from XXX in the last three years

IMPORT ITEMS	TRADE IN US\$ millions			TRADE AS A PERCENTAGE OF THE COUNTRY'S TOTAL IMPORTS		
	1997	1998	1999	1997	1998	1999

Major Exports to XXX in the last three years

EXPORT ITEMS	TRADE IN US\$millions			TRADE AS A PERCENTAGE OF THE COUNTRY'S TOTAL EXPORTS		
	1997	1998	1999	1997	1998	1999

Major XXX companies operating in our country ...

NAME OF COMPANIES	PRODUCTS/SERVICES	EQUITY PARTICIPATION (eg. WHOLLY OWNED, JOINT VENTURE)

ANNEX 16 : SAMPLE OF SURVEY COVERING LETTER AND QUESTIONNAIRE

SURVEY OF NEW MEMBERS' COMPANY DATA AND INTERESTS

Name of Member Enterprise
Name of Director
Street
City

Dear Mr/Ms,

Yesterday you made a good decision : you became a member of (name of our Chamber of Commerce and Industry)

To help you make the best possible use of your membership, we request that you take about 15 minutes to fill out the enclosed questionnaire and to mail or fax it back to us at your earliest convenience.

- The data on your enterprise (sections I – IV) gives us an indication of the events and services which are of interest to you. In this way you will always receive the relevant invitations and announcements !
- If you inform us of what you expect from us, we can align our work even more closely with your wishes and needs.

We thank you for your co-operation and are happy to be available for personal discussions, information, etc. In anticipation of fruitful co-operation, we remain

Yours sincerely,
(Name of our Chamber of Commerce and Industry)

(Signature)

Name of Signatory

Questionnaire for registration of member's data and areas of interest

Please send back to :
(Name of Chamber)
(Address of Chamber)
(Telephone / Fax no)

I. Basic Data on Enterprise

Name _____

Address _____

Phone/Fax _____

Legal Status _____

Year of Establishment _____

Today's date _____

II. Contact Persons

	Name	Position	Phone	Languages
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

III. Sphere of Activities

Production, mainly of : 1. _____
2. _____
3. _____

Trade, mainly in : 1. _____
2. _____
3. _____

Services, mainly : 1. _____
2. _____
3. _____

IV. Size of Enterprise

- 1 - 25 employees
- 26 - 100 employees
- 101 - 500 employees
- > 500 employees

V. Foreign Trade

Exports : Export volume in (year) : _____ (US\$ or local currency)

Product	Exported to	Volume of export as percentage of total export volume

Imports: Import volume in (year) : _____ (US\$ or local currency)

Product	Imported from	Volume of import as percentage of total import volume

VI. Expectations of (name of Chamber/ Business Association)

Please evaluate the importance of the activities of our organisation for your enterprise by ticking the appropriate box (the higher the number, the more important the activity is for you, ie. 1 = not important, 10 = very important).

A. Interest Representation

- 1 2 3 4 5 6 7 8 9 10
-

B. Services

Overall :-

1	2	3	4	5	6	7	8	9	10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Individual services :-

	1	2	3	4	5	6	7	8	9	10
Legal advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade fairs/exhibitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co-operation between firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrative advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VII. Comments

Source : Adapted from manual on Attracting new members/Membership Administration.

ANNEX 17 : CHECKLIST FOR ANNUAL DINNER

Date : Set date for Annual Dinner

Venue :

1. Shortlist a few possible venues for holding the dinner
2. Check out terms offered by the various venues –
cost of dinner, menu offered, cost of pre-dinner cocktails corkage charges
facilities – ballroom, stage, lectern, banner, pipe-in music, parking space
3. Other considerations –
location of venue
reputation for good service
4. Select venue with best reputation and most competitive terms

Budget : Draw up budget – taking into consideration, the following cost items...

1. Cost of tables to be sold to members
2. Cost of tables reserved for office bearers, guests and staff (Some chambers get their member companies to host the Chamber's guests at their tables)
3. Pre-dinner cocktails and drinks for guests at dinner
4. Printing of invitation cards and postage
5. Miscellaneous expenses eg. banner, music, corsages for hosts, etc

After taking into consideration, all cost items, decide on price at which to offer tables to members.

Guest of Honour :

1. Invite Guest of Honour and spouse to grace the occasion
2. Request Guest to address members at the dinner
3. Establish contact with Guest's aide and liaise with him/her to
 - finalise details re. any policy announcement that might be made by the Guest in his speech (often Ministers choose the occasion to make public, Government's plans for the trade and industry sector)
 - greeting of Guest by reception committee at the dinner
 - number of security officers who will accompany the Guest to dinner and where they should be seated

Guest List :

1. Draw up list of guests to invite to the dinner
2. Print invitation cards and send them to guests on list with request that guests "RSVP"
3. Collate replies and if these are not forthcoming, telephone for response
4. Nearer the date of the dinner, plan seating arrangements for guests matching them with relevant hosts (usually the key office bearers and Board members will host on behalf of Chamber)
5. Inform hosts of the guests who will be at their table

Marketing

Send circulars to members to encourage them to book tables for the dinner. If response is slow, send reminders

Allocation of tables

Tables are usually allocated to members on a first-paid-first-allocated basis. However, some exceptions are made eg. an office bearer selected to host one of the Chamber's guest tables may request that his own company's table be also situated nearby so that he could also look after his company's guests

President's address

Research and Public Relations Divisions will draft President's speech for the dinner. PR will send copies to the media and invite them to cover the event

Final details

Prepare alphabetical lists of guests and company members and the number of the table they are allocated. Arrange with the hotel to display an enlarged floor plan at the entrance to the ballroom. On the night of the dinner, secretariat staff members "man" the reception desks and help hosts identify their guests

On the afternoon of the dinner, staff responsible for organising the dinner to check out venue, confirm all arrangements made re. pre-dinner cocktails, direction signs, floorplan, stage, lectern, table arrangements, etc. Staff to arrange seating plans at VIP tables.

ANNEX 18: PROGRAM PLANNER FORMS

Guidelines for filling the following set of program planner forms ...

Program pre-planner - A user friendly form to be filled by the Secretary-in-charge of a program regarding requirements for the program. The form should be filled at least 20 days before the scheduled day of the program and submitted to the relevant office bearers for approval. The details of the program should be maintained in a file to be kept for reference in the library. Each program file will be given a number that should be mentioned in the form.

Program planner - This form is a sequel to the program pre-planner to be filled on the day of the program. It is a reference or checklist for the Secretary-in-charge and aids him/her in keeping track of the action plan of the program. A brief report of some important points made by the speakers and issues raised at the event should be included in this form. In the press coverage for the program provide names of newspapers that carried a report on the program with/without photographs.

Program follow-up - This is to provide details of follow-up actions initiated by the Secretary-in-charge of the program on important issues raised at the meeting or on assurances made to the members by the speakers. The details should include names of persons to whom follow-up letters have been sent and briefly mention the issues addressed in the follow-up. Also indicate if any outcome has been achieved of the follow-up action. If so, provide details of the outcome.

Program Pre-Planner

Name/Subject of program				
Objective of the program				
Proposed date & time				
Proposed venue				
Speakers invited				
Program initiated by (Chairman, Secretary)				
Invitation/circular to be sent to				
Requirements for the program (Specify)	Details (Numbers etc)	Responsibility assigned to	Deadline for making arrangements	Estimated Costs
Invitation cards/circulars				
Tea/Lunch/Snacks				
Stationery (specify)				
Banner				
President's speech				
Chairman's observations				
Name boards				
Recording equipment				
Hand outs				
Bouquets				

Memento				
Photographer/videographer				
Audio visual equipments				
Any other item (specify)				
Venue if outside office, a) names of persons required to attend b) mode of conveyance to transport the above mentioned to the venue	a) b)			
Press coverage	Details (Numbers etc)	Responsibility assigned to	Deadline for making arrangements	Estimated Costs
Invitation to press				
Reminder				
Press release				
President's speech distribution				
Program approved by Signature	President	Vice-President	Treasurer	Secretary
Program file number				

Program Planner

Name of the program _____

Date and venue _____

Invitation cards – indicate whether enclosed Yes [] No []

Speakers confirmed Yes [] No []

Caterers confirmed Yes [] No []

Press reminded Yes [] No []

Material to be distributed taken to venue Yes [] No []

Arrangements satisfactory Yes [] No []

Collection of speaker's speech & xerox copies to be made Yes [] No []

Report of the program:

Press coverage obtained (enclose press reports)

Anything lacking in the program and scope for improvement (review with office bearers & secretary concerned, on the next day)

Follow up required on issues raised during the program. If yes, provide details in form no 3.

Program Follow-up

Letters thanking speakers sent Yes [] No []

Follow up on issues raised/assurances made at the meeting initiated Yes [] No []

If yes, give details

Indicate if any result obtained from follow up

Source : Federation of Karnataka Chambers of Commerce and Industry (India).

RECOMMENDED READING

- **National Chambers of Commerce, A Primer on the Organization and Role of Chamber Systems**, by Markus Pilgrim and Ralf Meier (SEQUA) for CIPE, Centre for International Private Enterprises, Washington D.C., May 1995.
- **Confederation of Chambers – Functions, Foundations and Organizational Structures**, by D Mueller-Falcke, for SEQUA and ZDH Partnership Program, Feb.1998.
- **Comparative Study on the Chamber Laws of Germany, Austria, Thailand and Japan** by Mr.W. de Weldige-Cremer for SEQUA and ZDH Partnership Program, 1993.
- **Manual of Procedures for Management of the Chambers of Commerce of Thailand, Bangkok** by the Thai Chamber of Commerce/ITC /GATT, 1987.
- **Chamber Management Manual based on experience in Bangladesh** by Ms Ferdaus Ara Begum, published in co-operation with the ZDH Partnership Program, 1998.
- **One Year to Lead** by the Junior Chamber International
- **Foreign Trade Services of Chambers of Commerce – A seminar programme for Chambers of Commerce and other business organizations in Developing Countries**, Volume II by ITC/UNCTAD/GATT, 1986.
- **Chambers of Commerce – Services to Small and Medium-Sized Enterprises** by Mr. M.L. Nandrajog published by ZDH Partnership Program in co-operation with ITC/UNCTAD/WTO and ICC, 1996.

- **Income-Generating Activities of Chambers of Commerce** by Mr. B.P. Gunaji published by ZDH Partnership Program in co-operation with ITC/UNCTAD/GATT, ICC.
- **Income from Services** by Dr. Torsten Schuhmacher, published by SEQUA, November 1999.
- **Strategies for Membership Recruitment and Retention for Chambers of Commerce and Industry** by Dr. B.R. Sabade, published by ZDH Partnership Program, 1994.
- **Attracting New Members/Membership Administration** by Dr. Torsten Schumacher, published by ZDH Partnership Program, 1997.
- **Manual on Developing and Operating an Information Service for Chambers and Trade Associations** by Mr. Wong Chin Yeow, published by ZDH Partnership Program, Singapore.
- **Manual on Developing a Training Centre within a Chamber or Trade Association** by Mr. Wong Chin Yeow, published by ZDH Partnership Program, Singapore.
- **Manual on Setting up a Business Matching Service within a Chamber or Trade Association** by Mr. Wong Chin Yeow, published by ZDH Partnership Program, Singapore, March 2000.
- **Putting it all together ... in a Procedures manual** by the Chamber of Commerce of the United States.
- **Hyers & Katz's Portfolio of Business Forms** published by Hyers and Katz Institute of Management Science, Inc. 1986.