

NAOAT Chapter Formation Standards and Applicant Agreement

Effective September 12, 2026 | Version 2026-09-12-v1

These standards describe the responsibilities of a NAOAT chapter organizer. Applicants must read and accept this version when submitting a chapter proposal. Acceptance records the applicant's commitments; a chapter may launch only after written approval from NAOAT. This document does not establish a chapter, create an employment relationship, grant an exclusive territory, or promise funding.

1. Purpose and participation

Build a local community across advanced technology sectors and stages of company growth. Bring together entrepreneurs, founders, researchers, engineers, students, and employees of larger companies to exchange practical knowledge and develop professional connections.

Programs should connect different disciplines and company sizes. A chapter is a community program, not a sales lead list for its organizer. Give participants a fair opportunity to contribute and make commercial sponsorships clear.

2. Formation and leadership

Submit a proposed market, organizing team, first 90-day activity plan, meeting location or online format, and expected operating costs. Identify a lead organizer and the people responsible for programming and financial records. Responsibilities may be combined while a chapter is small, but financial approvals must remain documented.

NAOAT must approve the chapter in writing before organizers use the chapter name publicly, collect money on its behalf, sign chapter contracts, or represent themselves as an authorized local chapter. The approval must identify the authorized leaders and the scope of their authority. Apply separately for any material change in market, leadership, or financial arrangements.

3. Meeting frequency and locations

Hold at least one substantive chapter meeting in every rolling 30-day period after launch. In-person, hybrid, and live online meetings qualify. If a meeting must be canceled, arrange a replacement within the same 30-day period or request a written exception from NAOAT.

Use a safe, accessible professional location appropriate to the activity, such as a coworking space, university, company meeting room, community venue, or approved social club. Confirm permission, capacity, accessibility arrangements, costs, and any required insurance before announcing an event. Never assume a host will provide space without agreement.

Publish the date, time, location or joining instructions, topic, any admission fee, and accessibility contact at least seven days in advance when practicable. Offer a way for attendees to ask about access needs. Publish confirmed meetings only.

4. Meeting objectives and suggested agenda

Each meeting should provide practical education, purposeful introductions, and a clear next step. Rotate topics across technology sectors and invite perspectives from emerging businesses and established companies. Do not let a single sponsor or employer control participation.

Suggested 90-minute agenda: 10 minutes for welcomes and community updates; 20 minutes for a practical technology briefing; 20 minutes for a cross-sector discussion or demonstration; 30 minutes for facilitated introductions and collaboration; and 10 minutes for next steps and the next meeting. Adapt the format while preserving those objectives.

Ask participants what they are building, what expertise they can share, and what help they need. Follow up on agreed introductions with both parties' permission. Attendance never guarantees employment, investment, procurement awards, sales, or partnerships.

5. Education, resources and national participation

Help participants use NAOAT's available courses, news and practical resources. Identify useful local speakers and learning needs. Describe course completion accurately; do not claim accreditation, professional licensure, or continuing-education credits unless separately approved and documented.

Gather member feedback on industry issues and proposed national programs, including the annual conference. Chapter leaders may contribute ideas, but may not announce unconfirmed conferences, speakers, lobbying campaigns, or association policy positions.

6. Membership, dues and local allocation

Corporate annual dues are collected through NAOAT's authorized national checkout. A business may select one established chapter, or national membership without a local chapter, for attribution. Chapter selection does not add a second corporate membership fee and does not change the displayed revenue-based tier.

No chapter allocation percentage is approved in this version. Selecting a chapter records a preference for reconciliation; it does not create a payable balance or authorize an automatic transfer. A separate written financial schedule must define the approved percentage, eligible dues, treatment of taxes, refunds, disputes and payment fees, renewal attribution, payout timing, and any reserves before allocations begin.

Keep national membership dues separate from local event admission, local sponsorships, donations, and other income in the records. Do not promise tax deductibility or collect additional local membership dues without written authorization. Any local payment collection, bank account, spending authority, or sponsorship agreement requires approval under the chapter's financial schedule.

7. Records and accountability

Maintain a meeting calendar, concise meeting notes, attendance counts, an activity summary, and records of authorized income and spending. Send NAOAT a monthly report covering meetings held, education delivered, introductions facilitated, upcoming plans, and financial activity. Do not report private discussion details or personal information unnecessarily.

Use chapter funds only for approved chapter purposes, retain receipts, disclose conflicts of interest, and obtain documented approval for spending. Keep chapter funds separate from personal funds. Provide an annual activity and financial summary and cooperate with a reasonable review of chapter records.

8. Conduct, privacy and fair participation

Provide a respectful environment. Harassment, discrimination, threats, and misuse of participant information are not permitted. Explain how attendees can raise concerns and refer serious or unresolved issues to NAOAT. Obtain appropriate permission before publishing identifiable participant photos or sharing contact details.

Do not share confidential employer, customer, research, or participant information. Do not use meetings to coordinate competitors' prices, bids, customer allocation, or other anticompetitive arrangements. Stop and escalate inappropriate discussions. Participation does not authorize anyone to speak for another person's employer.

9. Brand, authority and changes

Use only approved NAOAT names and assets for approved activities. Identify sponsors separately and do not imply that membership certifies or endorses a product. Chapter organizers may not bind NAOAT or its operating entity, ALPHABULL LLC, to contracts, debt, public positions, or other commitments without written authority.

NAOAT may require a corrective plan, suspend authorization, or end a chapter's authorization for failure to meet these standards, misuse of funds, safety concerns, or misrepresentation. Organizers must stop representing a suspended or closed chapter as active and arrange an orderly handover of approved records and assets. Financial closeout is governed by the signed chapter agreement and applicable obligations.

Material changes to these standards will be published with a new version and communicated for renewed acceptance where required. The version accepted with an application will remain recorded with that application; future revisions do not silently replace that record.

10. Applicant acknowledgment

By checking the acceptance box and entering my name in the chapter application, I confirm that I have read this version, that the information in my proposal is accurate to the best of my knowledge, and that I agree to these formation standards and the approval process. I understand that application acceptance is not a chapter charter and that no revenue-share rate or payout entitlement has been established.

My account identifier, account email, entered name, application reference, acceptance time, and the version and text of these standards will be recorded with my application. I may download this document before submitting.