



Accounting & Financial Women's Alliance  
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# Building A Chapter Board

## Who You Need on Your Team & How to Make the Ask!

# WHEN to ask?

*anytime anywhere*

Volunteer recruitment should happen year-round. Not just in the spring.

**Committees** often have opportunities to get involved right away. From small, greet attendees at the next event, to large, helping to coordinate next month's speaker. No matter the size of the responsibility, if someone is ready to get involved, plug her in right away.



**Board positions** require a greater commitment and a member may take longer to decide if she will participate. Ask early to give her time to ask questions and talk with her employer and family.



**At this year's Event:** Do you host an annual event? While in the midst of the hype and success of this year's event, build your committee for next year.



**Board Meetings:** Take a few minutes during each regular board meeting to ask members to share names of possible volunteers. Also, share any tasks they could use some extra hands with. This will help bring new names to the table and encourage the board to work together to bring on new volunteers.



**Regular Networking:** You never know when a member will ask to get more involved. Be prepared to make appropriate introductions, answer questions, and follow up.




**Holiday Networking Events:** You're relaxed and enjoying the season. This is a great time to ask someone to think about the year ahead.




# HOW to ask?

*Most of all*


Share your own experience and be excited about AFWA!




**Flattery:** ‘You’re so much fun! You would bring a great energy to our Board.’ ‘You are so well connected in this town, you should join our Membership committee.’ ‘I love your handwriting, would you help address thank you cards?’



**Don’t downplay responsibility:** It’s tempting to say ‘oh, it won’t take too much of your time.’ People are going to give what you ask. Be honest about the goals, expectations, and commitment required of the position.



**Acknowledge skills:** ‘I hear you planned a great event for your company. You should think about joining our Programming committee.’



**Make a match:** If you meet a member who is interested in a specific committee, be sure to introduce her to the current chair of that committee.



**Plant the seed:** Have your eye on a potential new board member? Plant the seed early, ‘Board Nominations will come up in the Spring, you should think about it.’ Then, follow up, ‘have you given any more thought to joining the Board, what questions do you have?’ Then ask, ‘We have an open director position, I’d love to have you join the Board.’



**Follow up:** If someone says they want to volunteer – act fast! Follow up with her and set her up to get involved now, or in the near future.



# WHO to ask?

*Consider diversity*

Among your board and volunteers



**AFWA Experience:** There is great opportunity where the old meets the new. Long-time AFWA members will uphold tradition, and newer members will bring in a fresh spin. Be sure all experiences are represented on your Board.



**Professional Experience:** Members value the opportunity to learn from others, your board should encourage this. Consider various levels of career experience as you build your volunteer base.



**Career Path:** AFWA members represent a wide range of accounting and finance careers, be sure different career paths are represented on your Board. Each will have a different voice for their career needs.



**Young Professionals:** Be sure young professionals are represented on your Board. Not only will they have a fresh take on ideas and events, they represent the future of your Chapter.



**Students:** Is there a university in your community? Consider asking a student to join your board or committee. She could help build the connection with the university and present ideas that will be valuable to other students.



**Non-Members:** Sound crazy? Remind potential members of the leadership experience they can get through AFWA. If they hear about a volunteer opportunity they may decide to join and get involved right away.



# Build Your Team: Start at the Top

AFWA minimum standards require your Chapter to name a Chapter President and Treasurer



## PRESIDENT

- Preside over all Board and Membership Meetings
- Preside over Board Orientation & Annual Planning Meeting
- Delegate & coordinate all committees
- Monitor chapter progress and performance
- Ensure all AFWA forms are completed and submitted to HQ
- Act as the primary contact for the Chapter with AFWA National



## TREASURER

- Attend Board Orientation & Annual Planning Meeting
- Attend all Board and Membership Meetings
- Prepare monthly Treasurer's Report and submit to Board for review
- Prepare budget for submission to the Board
- Responsible for all financial transactions and records for the chapter
- Assists President in preparing summary report at end of year

Round out the Chapter's top leadership with a President-Elect, Secretary, and Past President



## PRESIDENT-ELECT

- Attend all Board and Chapter Meetings
- Assist the President with the Annual Planning Meeting
- Fill in when the President is not available
- Work closely with the President to prepare for leadership the following year



## SECRETARY

- Attend all Board and Chapter Meetings
- Record minutes of all Board Meetings and submit to Board for approval
- Prepare and respond to correspondence locally and nationally



## PAST PRESIDENT

- Attend all Board and Chapter Meetings
- Chair of Nominating Committee
- Responsible for bylaws and compliance
- Primary liaison for the council of Past Presidents





# Build Your Team: VPs, Directors, Committees



## PROGRAMMING

- Attend all Board and Chapter Meetings
- Plan a calendar of events for the chapter year including time, place, and topic of all events
- Confirm speakers and obtain bio and topic
- Coordinate speaker audio/visual needs with restaurant or other source
- Prepare CPE forms, collect completed CPE forms and submit to AFWA HQ for processing.

### SUGGESTED SUB COMMITTEES

- CPE Administrator: prepare and submit all CPE requirements and forms for events
- Social Chair: plans non-educational events, such as Happy Hours or networking outings
- Annual Event: responsible for planning and coordinating any annual or large events hosted by the Chapter



## MEMBERSHIP

- Attend all Board and Chapter Meetings
- Utilize the Chapter Dashboard to maintain current membership roster, making note of new members and recently expired members
- Initiate welcome and distribute “New Member” packet to all new members
- Identify potential new members and maintain guest tracking sheet
- Remind members with upcoming expirations, encourage renewal

### SUGGESTED SUB COMMITTEES

- Recruitment: charged with bringing new members to AFWA and keeping a guest list
- Engagement/Retention: promotes participation in activities, makes personal touches, and encourages renewals
- Hospitality: greets guests and makes introductions of new members at meetings



# Build Your Team: VPs, Directors, Committees



## COMMUNICATIONS

- Attend all Board and Chapter Meetings
- Responsible for maintaining the website, including updating the events section to include our monthly dinner meetings
- Manages and engages on Chapter social media accounts
- Prepares and distributes Chapter newsletter
- Promote Chapter events to AFWA membership and the community – provide info to AFWA HQ for the national website
- Distribute press releases as needed

### SUGGESTED SUB COMMITTEES

- Digital: responsible for updating the Chapter website and social media accounts
- Publicity: distributes board and meeting announcements to local media outlets, and pursues community involvement
- Newsletter: works with each committee chair to distribute AFWA news via a monthly newsletter to members



## SCHOLARSHIP

- Attend all Board and Chapter Meetings
- Send applications to colleges to obtain scholarship candidates
- Review and select scholarship applicants
- Promote interest in AFWA to various college and university organizations and clubs by offering AFWA services as speakers
- Coordinate a “student” recruitment event
- Coordinate annual fundraiser for the scholarship fund
- Share awardees with AFWA HQ for promotion

### SUGGESTED SUB COMMITTEES

- Scholarship: specifically assigned to soliciting scholarship applicants and selecting recipients
- Fundraising: works with the programming committee to coordinate annual fundraiser
- Student Relations: works to establish a relationship with local universities to promote AFWA and involve students



# Build Your Team: A new approach



Our Chapter is in a large market. Members have to drive too far to get to meetings.



Young Professionals have different interests than our core membership



Should we encourage the local University to start a student chapter or invite students to join our professional Chapter?

Challenge

Solution

NETWORK AMBASSADORS	YP GROUP	STUDENT REPRESENTATIVE
<ul style="list-style-type: none"> <li>Empower a volunteer to coordinate activities in the different regions of your city (i.e. Northside/Southside)</li> <li>In addition to the monthly Chapter meeting, local network ambassadors may plan happy hours in convenient locations</li> <li>Identify members who live in similar parts of town to promote local networking</li> <li>Ambassadors are encouraged to reach out and welcome new members in their local area</li> </ul>	<ul style="list-style-type: none"> <li>Identify a volunteer to lead a Young Professionals group</li> <li>The YP leader should participate in board meetings and be supported by the chapter budget</li> <li>In addition to the monthly Chapter meeting, the young professional group may plan a YP happy hour or alternate event specific to their interest</li> <li>Charge this group with their own recruitment goal to bring more YPs to the Chapter</li> </ul>	<ul style="list-style-type: none"> <li>Either way, encourage a strong relationship between the professional chapter and students</li> <li>Invite a student representative to sit in Board meetings to express needs and interests of students</li> <li>Student members of a professional chapter may host their own events in addition to monthly chapter meetings (these should be supported by the chapter budget)</li> <li>Encourage professional members to participate as speakers at student events</li> </ul>





# Some Closing Thoughts...

- Divide and Conquer
  - You'll accomplish more as a team. Delegating work takes the burden off one individual and engages more members.
  - Engaging members often also helps develop a succession pipeline for your directors and volunteers.
- Know your local businesses
  - The opportunity to develop leadership skills is a great benefit in the eyes of employers. Reach out to local businesses and industries in your community to invite them to AFWA!
- Most people don't join because they were never asked
  - To join AFWA or to join your leadership – **always make the ask!**





# Questions about building your Board?

Contact [chapters@AFWA.org](mailto:chapters@AFWA.org) or 859-219-3590

