

AFWA Chapters

CHAPTER CHARTERING PACKET

The official guide to chartering an AFWA Chapter



Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD

CHAPTERS



GETTING STARTED

What is AFWA?

The Accounting & Financial Women's Alliance (AFWA) promotes the professional growth of women in all facets of accounting and finance. Members increase their career potential by connecting with colleagues, receiving education and mentorship to advance their careers, and through developing their leadership skills. For over 80 years, members have tapped into a network of successful, motivated, and influential professionals who understand the unique position of being a woman in the industry and who, together, contribute to the future development of their profession.

Why start an AFWA Chapter?

The AFWA Chapter program gives members the opportunity to belong to a national professional organization and connect with others with similar professional and career goals on both a national and local level.

CONNECT

- With colleagues and friends to begin building your professional network
- At local and national conferences hosting accounting and finance professionals from across the country
- At local Chapter events, with over 50 Chapters nationwide, you're bound to find a local AFWA Chapter in the city where you reside

ADVANCE

- By learning new technical skills and developing professional skills necessary to increase your employment value.
- By developing a strong network with women with common goals, who will go on to work for a variety of companies
- By serving in a leadership position

LEAD

The leadership positions you assume within the organization translate to higher aptitude to lead in the workplace and industry

- Enhance your resume
- Impress potential employers
- Boost your employee value



STEPS TO START AN AFWA CHAPTER

The following steps were designed to guide students, professional members, and AFWA National in the chartering of an AFWA chapter and to establish a standard level of excellence in the ongoing management of the new Chapter.

1. Contact the AFWA National Headquarters office to express interest in launching a chapter. The AFWA Membership Coordinator will become the point of contact to assist with the chartering process and will work directly with the Chapter liaison for implementation of the new chapter.
 - (a) Contact afwanational@afwa.org or 859.219.3532
2. Complete the New Chapter Questionnaire found on page 6 of this manual.
3. The AFWA Chapter Liaison will coordinate a kick-off meeting to review the questionnaire responses, discuss the mission of AFWA and Chapter programming, and provide details on Chapter procedures. This group will initially be established as a Network. At this time, the founding members should vote to continue with the chartering process, and each founding member should join AFWA as a member of the virtual chapter.
[Join Now - Accounting and Financial Women's Alliance \(afwa.org\)](https://www.afwa.org)
4. The founding members should begin recruiting additional members for a minimum of 15 total members. All members should initially join the virtual chapter of AFWA until the new AFWA Chapter is fully established. Refer to page 5 of this manual for recruitment tips and ideas.
5. The founding members, along with newly recruited members, should now begin establishing leadership.
 - (a) At a minimum, elect two officers. Suggested board positions include a President and Secretary/Treasurer. If appropriate, based on the size of membership, the list of elected officers may expand to include President-Elect, Vice President, Directors, and a separate position for Treasurer.
 - (b) In the beginning, it is recommended the Chapter recruit leaders who can commit to a minimum of 2-years on the Board.
 - (c) Complete the AFWA Chapter Leadership Form found on page 7 of this packet.



STEPS TO START AN AFWA CHAPTER

6. The goal of all AFWA Chapters is to develop members through the combined process of continuous learning and networking. Prepare a calendar of meetings for the year with a goal of at least one event per month during the year. Events should promote professional development, networking, skills development, exposure to professionals, etc. A few ideas to get you started:
 - (a) All about AFWA
 - (b) Topics presented by chapter leadership
 - (c) Topics presented by accounting and finance professionals in the community
 - (d) AFWA will on occasion provide packaged presentation for use by our Chapters.
7. Review the National model Chapter bylaws and standing rules as the Chapter's governing documents. The AFWA Membership Coordinator can assist with preparing a draft of your Chapter's bylaws for pre-approval by the AFWA National President-Elect. Once the bylaws have been pre-approved, Chapter members must be given a 30-day notice prior to a vote to adopt the bylaws.
8. Determine the amount for Chapter Dues in accordance with the dues tier system of National.
9. Contact AFWA National to apply for a Chapter EIN with the IRS and then establish a bank account for the Chapter. (To be completed after the charter is approved.) National Headquarters can assist with this process.
10. Your Chapter Charter will be reviewed for approval by AFWA National upon submitting the following (once all documents have been collected by the Chapter, your Chapter Liaison should be contacted to assist with submitting the required documents and chartering petition to the National Board)
 - (a) A member approved one-year plan of action for the Chapter
 - (b) Membership roster and dues for the current year (or copies of applications for current members)
 - (c) The approved Chapter bylaws
 - (d) A roster of Chapter Officers and Directors
 - (e) The ACH Authorization Form (bank account can be established after EIN and charter received)
 - (f) The Chapter Dues Rate Form
11. After approval by the National Board members will be billed for chapter dues.
12. Begin planning your Chapter's Chartering celebration. Invite AFWA National Board, Staff and Volunteers and local professional members. If possible, give at least 8 weeks' notice for national representatives to participate.



RECRUIT MEMBERS

Your chapter liaison can help you brainstorm a recruitment plan for your chapter. In addition, check out the [Chapter Membership Toolkit](#), located on the AFWA Members Only website, or contact afwanational@afwa.org for additional recruiting materials.

- Organize an informational session to introduce AFWA, discuss the benefits of becoming a member, and cover initiatives and plans for the upcoming year.
- Create a list of accounting and finance firms in your area and reach out to them with information about the new chapter.
- Create a list of local businesses that have accounting and finance departments and reach out to them with information about the new chapter.
- Speak with business class professors and ask for a few minutes at the beginning of class to introduce AFWA.
- Post flyers on bulletin boards.
- Start a social media account, or build a website for your Chapter
- Contact the newspaper to purchase ad space or post to an events calendar
- Potential members should be encouraged to join AFWA at afwa.org/join, however a paper application (included in this packet) can be a nice onsite recruitment tool. Any paper applications should be sent to AFWA headquarters at 2365 Harrodsburg Rd, Suite A325, Lexington, KY 40504.



CHARTER CHECK LIST

Use this checklist as a helpful guide to keep you and other founding members on track during the Chartering process.

- AFWA chapter liaison
Name: _____
Contact: _____
- Join AFWA as a member of the “virtual chapter” (afwa.org/join)
- Begin an active membership roster for the chapter (see page 8 of this packet for a sample)
- Create a recruitment plan, and recruit a minimum of 15 total members
Recruitment Strategy 1:

Recruitment Strategy 2:

Recruitment Strategy 3:

- Elect leadership and provide contact information to national headquarters (email: afwanational@afwa.org)



CHARTER CHECK LIST

- Prepare a calendar of meeting dates and topics for the upcoming year
- One-year plan of action: including membership goals, recruitment plans, and other chapter initiatives
- Create and approve Chapter bylaws
- Determine Chapter dues amount
- After Chapter Charter Approved:
 - Request that AFWA National Apply for an EIN with the IRS
 - Establish a Chapter bank account
- Submit a Chartering petition to AFWA National (See page 9)
- Plan a Chapter Chartering celebration!



AFWA CHAPTER LEADERSHIP

Chapter Name: _____

Date: _____ Year: _____

Minimum of Two Officers Required for Chapter Charter

Position: _____

Name: _____

Email: _____ Phone: _____

Position: _____

Name: _____

Email: _____ Phone: _____

Position: _____

Name: _____

Email: _____ Phone: _____

Position: _____

Name: _____

Email: _____ Phone: _____

Position: _____

Name: _____

Email: _____ Phone: _____

Position: _____

Name: _____

Email: _____ Phone: _____

Submit to AFWA Headquarters at afwanational@afwa.org



Accounting & Financial Women's Alliance

Chapter Chartering Petition

We the organizing members of the prospective chapter _____ have met the requirements to become an active Accounting & Financial Women's Alliance chapter and do hereby petition the national board of the Accounting & Financial Women's Alliance to grant us a chapter charter.

The following documents are enclosed:

- ❖ An approved 1-year plan of action.
- ❖ Roster of members (minimum 15 members at large).
- ❖ Copy of approved chapter bylaws.
- ❖ Chapter leadership form (minimum of 2 officers).
- ❖ Chapter dues form

The following documents will be sent as soon as available following the charter:

- ❖ EIN Letter
- ❖ ACH Authorization Form

Signature of President

Date

Signature of Secretary

Date

Submit form and attachments to AFWA Headquarters at afwanational@afwa.org