



CHAPTER LEADERS AND TRANSITION PLAYBOOK



Accounting & Financial
Women's Alliance

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INTRODUCTION AND WELCOME



The Chapter Leaders and Transition Playbook is designed to be a tool to help chapters and chapter leaders with a smooth transition each year as new leaders come into the organization. It is designed to put a framework in place to ensure chapter leaders have the tools they need to succeed. It will ensure that Chapter Leaders can start leading the Chapter on the day they take office instead of trying to figure out what needs to be done. We are confident that following this playbook will ensure that Chapters position themselves to grow and succeed.

Welcome to Leadership where every decision carries weight, every action sets a precedent and every individual's potential is both your responsibility and your privilege to cultivate. Your role as a chapter leader is pivotal, as you not only steer the course of your chapter but also nurture its members, empowering them to reach their fullest potential. Your dedication, vision, and integrity shape the character and success of the chapter, leaving an indelible mark on its legacy and the lives it touches. What you do is so important to the growth and development of your chapter.



AFWA MISSION AND VISION

AFWA has a long and rich history that has enabled women to succeed and grow within their profession helping women Connect.Advance.Lead.™



MISSION OF AFWA

The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and finance fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession.

Aligning chapter activities with the organization's overarching goals is not merely a strategic choice; it's a testament to our commitment to collective progress. By synchronizing our efforts with the broader vision, we amplify our impact, enhance our relevance, and ensure that every initiative contributes meaningfully to the greater mission. Through this alignment, we harness the full potential of our resources, foster cohesion within our community, and pave a path toward shared success, driving us closer to realizing our collective aspirations.



ROLE AND RESPONSIBILITIES OF CHAPTER LEADERS

Chapter leaders within the Accounting and Financial Women's Alliance (AFWA) play a vital role in ensuring the success and effectiveness of their respective chapters. Creating a successful chapter is about creating a team. One person cannot do it all. Below is a detailed breakdown of additional roles and responsibilities associated with leading an AFWA chapter beyond President, President Elect, Secretary and Treasurer.



EVENTS CHAIR

- Organize and oversee chapter events, including meetings, seminars, workshops, and networking sessions.
- Coordinate with guest speakers, venues, sponsors, and vendors as necessary.
- Ensure events are relevant, engaging, and beneficial to chapter members.
- Make attendees feel welcome.
- Submit CPE requests to National in the appropriate format and in a timely manner.



MEMBERSHIP ENGAGEMENT CHAIR

- Recruit new members and retain existing members by promoting the value of AFWA membership using the AFWA Recruiting and Retention Playbook.
- Provide support and resources to chapter members by registering as a Mentor in AFWA's Mentorship Program, fostering their personal and professional growth.
- Train members how to recruit new members.
- Ensure all members have a successful journey as a member of your chapter.



COMMUNICATIONS CHAIR

- Communicate regularly with members through newsletters, emails, social media, and other channels.
- Disseminate relevant information, updates, and announcements related to chapter events and national events and initiatives.
- Assist in content creation or revisions for the chapter's website.
- Utilize resources from National and share National content as your own.



AFWA HEADQUARTERS LIAISON

- Maintain open lines of communication with AFWA headquarters, providing updates on chapter activities, achievements, and challenges.
- Participate in the various AFWA Chapter Leaders calls to share best practices and leverage resources effectively.
- File necessary annual reports with Headquarters in a timely manner.



PROFESSIONAL DEVELOPMENT CHAIR

- Continuously seek opportunities for professional development and leadership training to enhance leadership skills and knowledge.
- Encourage and support the professional development of chapter members through educational programs, mentorship, and networking opportunities.



NOMINATING - LEADERSHIP SUCCESSION CHAIR

- Follow steps in Section 4 of this playbook.
- Update AFWA Chapter Leader Form to develop and implement a succession plan to ensure smooth transitions in leadership roles. File with National on an annual basis and update as changes are made.
- Please Note: Those serving on the Leadership Succession Committee are not permitted to be on the slate of candidates for officer or committee positions.

By fulfilling these roles and responsibilities effectively, chapter leaders contribute significantly to the growth, impact, and sustainability of their AFWA chapters, empowering women in the accounting and finance profession. Having a team in place ensures growth.





TRANSITION PLANNING AND SUCCESSION

Chapter leaders of the Accounting and Financial Women’s Alliance (AFWA) play a crucial role not only in current operations but also in ensuring smooth transitions between outgoing and incoming leaders. Transition planning and succession are vital components to maintain continuity and stability within the chapter. Here’s a detailed breakdown of guidance on developing a smooth transition plan and best practices for succession planning:



DEVELOPING A TRANSITION PLAN

- **Early Identification:** Encourage outgoing leaders to identify their successors well in advance to facilitate a seamless transition.
- **Chapter Structure:** Establish a Chair, Vice Chair and Past Chair system to ensure continuous growth, succession and promote volunteers that thrive.
- **Clear Timeline:** Establish a timeline outlining key transition milestones, such as announcement of new leaders, handover of responsibilities, and official transition dates.
- **Document Processes:** Document all essential processes, procedures, and responsibilities associated with the role to guide the incoming leader effectively.
- **Training and Mentoring:** Provide training for incoming leaders to familiarize them with their roles and responsibilities.



GUIDELINES FOR OUTGOING LEADERS

- **Knowledge Transfer:** Encourage outgoing leaders to conduct thorough knowledge transfer sessions with their successors, sharing insights, lessons learned, and important contacts.
- **Capture Current Activities:** Record all ongoing tasks, pertinent information to facilitate seamless transitions and prevent redundant efforts each year.
- **Support and Guidance:** Offer ongoing support and guidance to outgoing leaders throughout the transition process, ensuring they feel appreciated and valued for their contributions.



PREPARING INCOMING LEADERS

- **Onboarding Process:** Develop an onboarding process for incoming leaders, including orientation sessions, and access to necessary resources.
- **Shadowing Opportunities:** Facilitate opportunities for incoming leaders to shadow outgoing leaders and gradually assume responsibilities, allowing for a smooth transition period. A Chair, Vice Chair, Past Chair system works well for this.



BEST PRACTICES FOR SUCCESSION PLANNING

- **Identifying Potential Leaders:** Encourage ongoing talent identification efforts to identify potential future leaders within the chapter. Understand that the number one reason people don't get involved is that they were never asked.
- **Leadership Development:** Provide leadership development opportunities, such as training programs, workshops, and mentorship, to prepare potential successors for leadership roles.
- **Diverse Leadership:** Strive for diversity and inclusion in leadership succession planning, ensuring representation from various backgrounds and perspectives.
- **Regular Review:** Continuously review and update succession plans to adapt to changing needs and circumstances within the chapter.
- **Encourage Continuity:** Emphasize the importance of continuity and stability in leadership transitions, aiming for seamless handovers to maintain momentum and progress within the chapter.



COMMUNICATION AND TRANSPARENCY

- **Open Dialogue:** Foster open communication and transparency throughout the transition and succession planning process, keeping everyone informed and engaged.

By following these guidelines and best practices, chapter leaders can effectively navigate transitions and succession planning, ensuring the long-term success and sustainability of their AFWA chapters.



CHAPTER OPERATIONS AND ADMINISTRATION

MANAGING CHAPTER OPERATIONS



Meetings

1. **Agenda Template:** Use AFWA agenda template for creating meeting agendas, including space for discussing old and new business, announcements, and action items.
2. **Meeting Minutes Template:** Use AFWA minutes template for recording meeting minutes, capturing key discussions, decisions, and follow-up tasks.
3. **Roberts Rules:** Take some time at the beginning of each year to ensure your leaders understand the basics of Roberts Rules. Resources through AFWA National are available.
4. **Strategic Planning:** Hold an annual planning meeting to set the goals and objectives for the year. This meeting should be held at least 2 months prior to the start of the fiscal year. Invite National Leaders or Headquarters Staff to assist.



Event Member Activities

1. **Activity Calendar:** Maintain a centralized calendar of upcoming member activities, including meetings, social events, and professional development opportunities. Share this with AFWA national.
2. **Volunteer Sign-Up Sheet:** Provide a sign-up sheet for members interested in volunteering for specific activities or committees. A campaign at least 2 months prior to the start of the new fiscal year works well.
3. **Member Survey:** Conduct periodic surveys to solicit feedback from members regarding their interests, preferences, and satisfaction with chapter activities.
4. **Event Planning Checklist:** Develop a comprehensive checklist to guide event planning activities, from venue selection to promotion and logistics.
5. **Evaluation Form:** Design an evaluation form for gathering feedback from attendees after events, helping to assess satisfaction and identify areas for improvement.



MEMBERSHIP RECRUITMENT AND RETENTION

The leader's role in recruitment, retention, and engagement of members is pivotal in shaping the vitality and longevity of our organization. Through thoughtful recruitment strategies, we welcome diverse perspectives and talents, enriching our collective experience and expanding our potential for innovation. By nurturing strong bonds and fostering a culture of inclusivity, we enhance retention, ensuring that every member feels valued, supported, and empowered to contribute their best. Moreover, through proactive engagement initiatives, we ignite passion, inspire commitment, and cultivate a sense of belonging, transforming members into active participants and champions of our shared vision. Together, we thrive, united by purpose and driven by the collective strength of our organization.

Creating annual guidelines for membership recruitment and retention ensures a structured approach to attracting new members while also nurturing existing ones. Here's a framework for such guidelines:

1. **Set Clear Membership Goals:** Define specific, measurable goals for membership recruitment and retention for the upcoming year. Consider factors such as growth targets, member demographics, and desired retention rates.
2. **Understand Member Needs:** Conduct surveys or focus groups to understand the needs and preferences of current and potential members. Use this feedback to tailor recruitment and retention strategies accordingly.
3. **Develop Targeted Recruitment Strategies:** Identify target demographics and develop tailored recruitment strategies to appeal to them. This may include outreach events, targeted marketing campaigns, and referral programs.
4. **Enhance Member Benefits:** Review and enhance the benefits of membership to make joining the chapter more attractive. Consider offering exclusive resources, networking opportunities, professional development programs, and discounts on relevant services.

5. **Streamline Onboarding Process:** Ensure a smooth onboarding process for new members to facilitate their integration into the chapter community. Provide orientation sessions, welcome packets, and mentorship opportunities to help them feel engaged from the start.
6. **Promote Engagement Opportunities:** Highlight the various engagement opportunities available to members, such as committee involvement, event participation, and leadership roles. Encourage active participation to foster a sense of belonging and connection.
7. **Provide Ongoing Communication:** Maintain regular communication with members through newsletters, social media, and email updates. Keep them informed about upcoming events, chapter initiatives, and industry news to stay top-of-mind and engaged.
8. **Monitor and Evaluate Performance:** Track key performance indicators related to membership recruitment and retention, such as membership growth rates, renewal rates, and member satisfaction scores. Regularly evaluate the effectiveness of recruitment and retention efforts and make adjustments as needed.
9. **Celebrate Milestones:** Recognize and celebrate membership milestones, such as anniversaries or achievements, to show appreciation for members' loyalty and commitment to the chapter.
10. **Continuously Improve:** Solicit feedback from members on an ongoing basis and use it to continuously improve membership offerings, recruitment strategies, and retention efforts.

By implementing these annual guidelines for membership recruitment and retention, the chapter can attract new members, retain existing ones, and foster a vibrant and engaged community of professionals.

For specific information in this area please refer to the Membership Recruitment and Retention Playbook.





EVENT PLANNING AND EXECUTION



Planning

1. **Define Objectives:** Clearly articulate the goals and objectives of the event, whether it's networking, professional development, fundraising, or community outreach.
2. **Set a Timeline:** Establish a timeline for planning activities, including tasks such as securing a venue, developing a program agenda, and coordinating logistics.
3. **Budget Allocation:** Determine the budget for the event and allocate funds for expenses such as venue rental, catering, marketing materials, and guest speakers. **Delegate Responsibilities:** Assign specific tasks to committee members or volunteers, ensuring that each aspect of the event is well-coordinated.
4. **Contingency Planning:** Anticipate potential challenges or setbacks and develop contingency plans to address them effectively.
5. **Know Your Audience:** Ensure events target the various membership segments of your chapter and that there is something for everyone. Try something new.
6. **Work With Other Chapters and AFWA National:** There's no need to recreate the wheel. Look at what other chapters are doing and reach out to them for assistance. Don't hesitate to utilize AFWA National events for local chapter events.



Promoting

1. **Target Audience:** Identify the target audience for the event and tailor promotional efforts to reach them effectively.
2. **Multi-Channel Approach:** Utilize a combination of online and offline channels to promote the event, including email marketing and social media. Request promotion with AFWA national calendar. And/or inclusion in the Accountability Newsletter.
3. **Early Bird Registration:** Offer incentives such as early bird registration discounts or exclusive perks to encourage early sign-ups.
4. **Partnerships and Collaborations:** Partner with other AFWA partners as well as other organizations, businesses, or influencers to expand reach and attract a broader audience.



Execution

1. **Logistics Management:** Ensure that all logistical aspects of the event are well-coordinated, including venue setup, equipment rentals, catering arrangements, and transportation logistics.
2. **Program Agenda:** Stick to a well-planned agenda with designated time slots for each segment of the event, including keynote speeches, panel discussions, networking sessions, and interactive activities.
3. **Engagement Strategies:** Incorporate interactive elements such as Q&A sessions, live polls, and networking icebreakers to keep attendees engaged and invested in the event.
4. **Feedback Collection:** Solicit feedback from attendees during and after the event to gather insights, assess satisfaction levels, and identify areas for improvement.
5. **Follow-Up Actions:** After the event, follow up with attendees to thank them for their participation and provide any relevant resources, materials, or next steps.



Tips for Leveraging Various Platforms and Channels to Maximize Event Attendance and Impact

1. **Social Media Promotion:** Utilize popular social media platforms such as Facebook, Twitter, LinkedIn, and Instagram to create buzz around the event, share updates, and engage with potential attendees. AFWA National can help with putting the word out.
2. **Email Marketing Campaigns:** Develop targeted email marketing campaigns to reach out to members, subscribers, and past attendees, providing them with event details, registration links, and exclusive offers.
3. **Event Listing Platforms:** Post event listings on relevant online platforms such as the AFWA Mobile App, Eventbrite, Meetup, and local community calendars to increase visibility and attract a wider audience.
4. **Networking Groups and Forums:** Leverage industry-specific networking groups, online forums, and discussion boards to spread the word about the event and connect with professionals who may be interested in attending.
5. **Collaborative Partnerships:** Start with AFWA's partners, also use industry associations, local businesses, academic institutions, and professional organizations to leverage their networks and promote the event to their members or followers.

By following these step-by-step guidelines and leveraging various platforms and channels effectively, Chapters can plan, promote, and execute successful chapter events that drive engagement, foster connections, and achieve organizational goals.



COMMUNICATIONS AND MARKETING

1. Communication guidelines for effectively communicating with chapter members and the broader AFWA community.
2. Marketing strategies to enhance the visibility and reputation of the chapter within the accounting and finance profession.



INTERNAL COMMUNICATION (CHAPTER MEMBERS)

1. **Clarity and Consistency:** Ensure all communications with chapter members are clear, concise, and consistent across all channels, whether it's email, newsletters, social media, or in-person meetings.
2. **Timeliness:** Provide timely updates on chapter activities, events, and initiatives. Regularly scheduled communications, such as monthly newsletters or weekly updates, can help keep members engaged and informed.
3. **Two-Way Communication:** Encourage open dialogue and feedback from chapter members. Create channels for members to voice their opinions, suggestions, and concerns, and actively listen and respond to their input. Encourage two-way communication by soliciting feedback, suggestions and ideas from members, fostering a culture of collaboration and inclusivity.
4. **Personalization:** Whenever possible, personalize communications to make members feel valued and engaged. Address members by name, tailor messages to their interests or involvement, and acknowledge their contributions to the chapter.
5. **Transparency:** Be transparent in your communication about chapter decisions, policies, and goals. Members appreciate honesty and openness, which helps build trust and foster a sense of community within the chapter.



EXTERNAL COMMUNICATION (BROADER AFWA COMMUNITY)

1. **Targeted Messaging:** Tailor messaging to specific segments of the broader AFWA community, such as industry professionals and students.
2. **Value Proposition:** Use AFWA's value proposition flyer which highlights key benefits, resources, and opportunities available to members and potential members.

By implementing these communication guidelines and marketing strategies, AFWA can effectively communicate with its chapter members and the broader community, enhance its visibility and reputation within the accounting and finance profession, and achieve its goals of promoting gender diversity, professional development, and networking opportunities.



MARKETING STRATEGIES

1. **Branding and Positioning:** Develop a strong brand identity for the chapter that reflects professionalism, expertise, and innovation. Clearly articulate the chapter's mission, values, and unique offerings to differentiate it within the profession.
2. **Networking Events:** Host networking events, seminars, and workshops that bring together professionals from the accounting and finance industry. Collaborate with other professional organizations and invite influential speakers to increase attendance and credibility.

3. **Online Presence:** Maintain an active and engaging online presence through a professional website, social media channels, and email newsletters. Share valuable content, industry insights, and chapter updates to establish credibility and attract a broader audience.
4. **Thought Leadership:** Position chapter leaders and members as thought leaders in the accounting and finance field by publishing articles, whitepapers, and blog posts on relevant topics. Participate in industry forums, panels, and speaking engagements to showcase expertise and build credibility.
5. **Partnerships and Sponsorships:** Forge strategic partnerships with reputable organizations, universities, and industry associations to expand reach and credibility. Seek sponsorships from relevant businesses and firms to support chapter activities and increase visibility within the profession.
6. **Professional Development:** Offer professional development opportunities such as certification courses, training programs, and mentorship initiatives to attract professionals seeking career advancement and skill enhancement.
7. **Recognition and Awards:** Recognize outstanding achievements and contributions within the chapter and the profession through awards, honors, and recognition programs. Celebrate successes publicly to enhance the chapter's reputation and attract top talent.
8. **Community Engagement:** Engage with the local community through volunteer activities, outreach programs, and charitable initiatives. Demonstrate the chapter's commitment to social responsibility and ethical leadership, enhancing its reputation within the profession and beyond.

By implementing these marketing strategies effectively, the chapter can enhance its visibility, credibility, and reputation within the accounting and finance profession, attracting top talent, fostering industry connections, and contributing to the advancement of the profession as a whole.





RESOURCES AND SUPPORT FROM AFWA NATIONAL HEADQUARTERS

OVERVIEW OF AVAILABLE RESOURCES



ONLINE PORTAL

AFWA National Headquarters offers an online portal accessible to chapter leaders, providing access to a wealth of resources, tools, and information. This portal serves as a central hub for all AFWA-related materials, including guides, templates, toolkits, playbooks, policies, and best practices.



RESOURCE LIBRARY

The resource library contains a diverse range of materials covering various topics relevant to chapter leadership, such as governance, membership management, event planning, fundraising, and financial management. Chapters can leverage these resources to streamline operations and enhance efficiency.



EXPERT GUIDANCE

AFWA National Headquarters provides expert guidance and support to chapter leaders through designated staff members and volunteer mentors. Leaders can seek advice, clarification, or assistance on specific challenges or initiatives, benefiting from the collective knowledge and experience of the AFWA community.



ACCESSING TRAINING, MENTORSHIP, AND NETWORKING OPPORTUNITIES



Training Programs

1. **Leadership Development Workshops:** AFWA offers leadership development workshops and free CPE designed to enhance the skills and capabilities of chapter leaders. These workshops cover a range of topics, including strategic planning, team building, communication, conflict resolution, and effective decision-making.



Mentorship Program

1. **Mentorship Matching:** AFWA facilitates a Mentorship Program, connecting chapter leaders with experienced mentors who can provide guidance, advice, and support on leadership challenges and career development opportunities.



Networking Opportunities

1. **Annual Leadership Conference:** AFWA hosts spring (Connect.Advance.Lead.™) and fall (Women Who Count) conferences that brings together members from across the country. The conference provides opportunities for networking, professional development, and collaboration, featuring workshops, keynote speakers, panel discussions, and networking sessions.
2. **Other Meetings and Events:** AFWA organizes meetings and events where chapter leaders can connect with peers in similar positions, exchange ideas, and build relationships. These gatherings facilitate networking and collaboration, fostering a sense of community and camaraderie among leaders.

By leveraging the resources and support provided by AFWA National Headquarters and actively participating in training, mentorship, and networking opportunities, chapter leaders can enhance their leadership skills, drive organizational success, and contribute to the advancement of women in the accounting and finance profession.





CONCLUSION AND NEXT STEPS



Summary of Key Takeaways

The Chapter Leaders and Transition Playbook has provided valuable insights, strategies, and best practices to empower AFWA chapter leaders in their roles. Key takeaways from the playbook include:

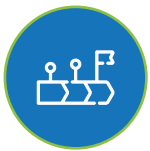
1. **Effective Leadership Practices:** Understanding the fundamentals of effective leadership, including communication, decision-making, and team management.
2. **Strategic Planning:** Developing strategic plans and goals to guide chapter activities, initiatives, and growth.
3. **Membership Engagement:** Implementing strategies to engage and retain members, foster a sense of belonging, and provide value-added services.
4. **Event Planning and Promotion:** Planning, promoting, and executing successful chapter events to drive engagement and visibility within the community.



Encouragement for Implementation

As chapter leaders, it's crucial to take action and implement the strategies and best practices outlined in the playbook to drive success and growth within your chapters. By embracing these principles and incorporating them into your leadership approach, you can:

1. **Strengthen Chapter Operations:** Streamline processes, improve efficiency, and enhance the overall effectiveness of your chapter's operations.
2. **Enhance Member Experience:** Provide valuable opportunities, resources, and support to members, ensuring a positive and rewarding experience which increases retention.
3. **Drive Organizational Impact:** Contribute to the advancement of women in the accounting and finance profession by leading your chapter with purpose, vision, and integrity.
4. **Foster a Culture of Excellence:** Cultivate a culture of excellence, collaboration, and continuous improvement within your chapter, inspiring members to strive for greatness.
5. **Increase Membership:** Individuals want to be a part of something special and improving your chapter creates that desire for individuals looking to join.



Next Steps

To begin implementing the strategies and best practices outlined in the playbook, consider the following next steps:

1. **Review and Reflect:** Take time to review and reflect on the key takeaways and action items from the playbook, considering how they can be applied to your chapter's specific context and objectives.
2. **Develop an Action Plan:** Develop an action plan outlining specific goals, timelines, and responsibilities for implementing the strategies and initiatives discussed in the playbook.
3. **Engage Chapter Members:** Involve chapter members in the implementation process, soliciting their input, feedback, and support to ensure buy-in and commitment to the proposed initiatives.
4. **Monitor Progress and Adapt:** Regularly monitor progress towards your goals, track key metrics and indicators, and adapt your approach as needed based on feedback and outcomes.

By embracing the principles outlined in the playbook and taking proactive steps to implement them within your chapter, you can drive meaningful impact, foster growth, and advance the mission of AFWA to empower women in the accounting and finance profession.

Thank you for being a part of your Chapter's growth. Together, as stewards of progress and champions of our organization, we write the next chapter of our success story, fueled by passion, united in purpose, and committed to leaving a lasting legacy of growth and achievement. You can make a difference and we thank you.

Additional resources available at www.afwa.org or contact us at afwanational@afwa.org.



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