



## THE CHECKLIST

### *Steps to become a Women for WineSense Chapter*

Welcome to the Women for WineSense Chapter application process. We are excited that you are interested in starting a chapter in your area. We have a strong support system for chapters. To learn more and connect with the Chapter Development Director send an email to [chapter\\_development@womenforwinesense.org](mailto:chapter_development@womenforwinesense.org). We will provide support and mentoring for you as you go through the chapter development process.

<u>ITEM</u>	<u>Completion Date</u>
<b>STEP 1: Initial Founding Group</b>	
<input type="checkbox"/> Contact WWS National by email <a href="mailto:president@womenforwinesense.org">president@womenforwinesense.org</a>	_____
<input type="checkbox"/> Conduct phone interview with National Chapter Development Director ( <a href="mailto:chapter_development@womenforwinesense.org">chapter_development@womenforwinesense.org</a> )	_____
<input type="checkbox"/> Conduct phone interview with National President ( <a href="mailto:president@womenforwinesense.org">president@womenforwinesense.org</a> )	_____
<input type="checkbox"/> Identify 2-3 individuals to be the founding members and officers	_____
<input type="checkbox"/> Review and print <i>Section IV: Chapters, Section V: Chapter in Development, Chapter in Development Checklist and Application</i> from WWS Website, <a href="http://womenforwinesense.org">womenforwinesense.org</a> , Starting a New Chapter	_____
<input type="checkbox"/> Set a meeting time and place, often in a private home or wine shop.	_____
 <b>STEP 2: First meeting to assess interest</b>	
<input type="checkbox"/> Call prospective members interested in wine:	_____
a) 3 prospective officers minimum to fill President, Secretary, and Treasurer (an individual with a financial background) positions.	
b) Additional 3-6 potential members, some who could potentially fill committee Chairs: especially Event and Membership Chair(s).	
<input type="checkbox"/> Hold first meeting:	
a) Assess interest	
b) Review <i>Section IV: Chapters, Section V: Chapter in Development, Chapter in Development Checklist, Application and the Planning Document (The Doc)</i> .	
c) Assure President or alternate can be on monthly call meetings: 3rd Thursday every month 3pm PST.	
d) Decide whether to move forward and select next meeting date	_____



- Follow-up
  - a) Notify Chapter Development Director of decision to go forward or not \_\_\_\_\_
  - b) Call prospective members/chairs to invite to next meeting \_\_\_\_\_

**STEP 3: Set up Chapter in Development with WWS National**

- Designate members who will be officers and chairs
  - a) Become member of WWS using Club Express to assigned chapter \_\_\_\_\_
  - b) Designate members who will be in charge of first few events \_\_\_\_\_
- Contact National via email [president@womenforwinesense.org](mailto:president@womenforwinesense.org) and [chapter\\_development@womenforwinesense.org](mailto:chapter_development@womenforwinesense.org) to request:
  - a) Official Chapter Status: Chapter in Development (location) Chapter \_\_\_\_\_
- WWS National Administrator sets up Chapter with Club Express:
  - a) Set up Chapter Administrator Access \_\_\_\_\_
  - b) Set up Chapter chairs and officers access to their respective areas \_\_\_\_\_
  - c) Book Club Express Training Session \_\_\_\_\_
  - d) Learn how to post to Chapter Section of WWS Website \_\_\_\_\_
- Post Chapter-in-Development Information to WWS Website
  - a) Welcome message \_\_\_\_\_
  - b) Chapter contact information \_\_\_\_\_
  - c) Upcoming organizing and event information \_\_\_\_\_
- Follow-up
  - a) Print out remaining Sections of **WWS P&P Manual** \_\_\_\_\_
  - b) Call prospective members/chairs to invite to next meeting \_\_\_\_\_

**STEP 4: Second Meeting (officers/chairs only): Chapter Organization**

- Formally appoint Officers and Chairs
- Review Policy and Procedures (all officers/chairs)
- Plan theme and set schedule (month) for 2 National Events and 4 standard Chapter events
- Complete Chapter Application which includes:
  - a) Strategic Plan, year 1 \_\_\_\_\_
  - b) Annual Operating Budget on WWS Financial Template \_\_\_\_\_
  - c) Organizational Meeting Minutes \_\_\_\_\_
- Follow-up
  - a) Mail or email to National Administrative Assistant ([info@womenforwinesense.org](mailto:info@womenforwinesense.org)): Chapter Application



- With all attachments and Minutes \_\_\_\_\_
- b) Make a list of 15-25 wine lovers to invite to first event \_\_\_\_\_

**STEP 5: National Accepts Chapter as Chapter in Good Standing**

- Chapter Development Director reviews **Chapter Application** for completeness:
  - a) If complete, a recommendation is made to the National Board for a vote \_\_\_\_\_
  - b) National Board votes on Chapter Application \_\_\_\_\_
    - 1. President issues Chapter Approval Email to National Board \_\_\_\_\_
    - 2. National issues special minutes with vote to approve chapter and By-Laws to Chapter President \_\_\_\_\_
  - c) If incomplete, the Application is returned for completion \_\_\_\_\_
  - e) If not accepted, Chapter is dissolved \_\_\_\_\_
  - f) If accepted, Women for WineSense meeting can be held \_\_\_\_\_

**STEP 6: Chapter Begins Operation**

- Administrative Assistant reviews with President how to remain a Chapter in Good Standing \_\_\_\_\_
  - a) Quarterly Planning Document (The Doc), Annual Budget
  - b) Due date Calendar Officers to submit items listed on Due Dates Calendar
  - c) President/Alternate attends monthly National Board Teleconference 3rd Thursday 3 pm PST
  - d) Hold 4 minimum events per year (6 are normal) including the 2 National Events
- Establish business Bank account:
  - a) Take National Minutes to approve chapter and the WWS By-Laws to the bank. \_\_\_\_\_
  - b) National Treasurer issues \$300 to open Bank Account (reimbursed from future Chapter Dues reimbursement) \_\_\_\_\_
  - c) National CFO/Treasurers to be additional signer(s) on account \_\_\_\_\_
- Plan first Women for WineSense Chapter Event \_\_\_\_\_
  - a) Follow steps on **Events Planning Checklist and Events** (Guideline in P&P Manual)
  - b) Plan Event speaker/location/wine/food/cost
  - c) Set up event on Club Express calendar and WWS Website Chapter Section
  - d) Email event invitation to members/prospective members
- Set up chapter page on WWS Website \_\_\_\_\_
  - d) Welcome message
  - e) Chapter contact information
  - f) Officers
  - g) Photo(s) of new chapter board
  - h) Event Information
  - i) Newsletter/Chapter goals



- Hold Women for WineSense Educational Event
    - a) Review WWS Mission and Vision
    - b) Inform attendees how to sign up for membership on Club Express. Have printed applications available (send applications/payment to National)
    - c) Refer attendees to WWS Website for general information/future events
    - d) Have a sign-in sheet for attendees
    - e) Hold event with speaker, food, wine
- 

### **7. Remain Chapter in Good Standing**

- a) Issue Chapter Reports when due
- b) Issue Financial Reports when due
- c) Attend monthly national Board call meeting
- d) Host minimum of 4 events per year

Draft: 08.15.2011