



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. We will provide support and mentoring for you as you go through the chapter development process.

ITEM

Completion Date

STEP 1: Initial Founding Group

- | | |
|--|-------|
| <input type="checkbox"/> Contact WWS National by email president@womenforwinesense.org | _____ |
| <input type="checkbox"/> Conduct phone interview with National Chapter Development Director
(chapter_development@womenforwinesense.org) | _____ |
| <input type="checkbox"/> Conduct phone interview with National President
(president@womenforwinesense.org) | _____ |
| <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, womenforwinesense.org , Starting a New Chapter | _____ |
| <input type="checkbox"/> Set a meeting time and place, often in a private home or wine shop. | _____ |

STEP 2: First meeting to assess interest

- | | |
|--|-------|
| <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) <i>Review 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 and 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): 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
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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

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