

# Chapter Leadership Training:

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NAWIC

The National Association of  
**Women in Construction**

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**North Central** Region

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NAWIC  
The National Association of  
**Women in Construction**

**WiFi Password: NAWIC1025**





# Agenda:

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W Roles / Responsibilities

W Operations / Efficiency

W Chapter Meetings / Quorums

W Bylaws / Standing Rules /  
Policies / Guidelines

W Branding

W Chapter Finances:

- Tax Status
- IRS Requirements
- Audit
- Budget





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# Board Roles / Responsibilities





# Role of the Board

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- ✓ Board consists of:
  - Officers (also known as the Executive Officers)
  - Directors: At least 2, but can be different for each chapter
- ✓ Elected for a one-year term from the membership, by the membership
  - CANNOT serve more than 2 consecutive terms
- ✓ Must be Active or Corporate member
- ✓ Meet on a regular basis to conduct Association business



# Duties of Officers

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- W President
- W Vice-President
- W Recording Secretary
- W Corresponding Secretary
- W Treasurer
- W President-Elect
- W Immediate Past President



# NAWIC Knowledge

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- ✓ Sections C & F of the NAWIC Operations Manual
- ✓ Chapter Officer Handbooks
- ✓ Chapter Standing Rules & Policies
- ✓ Chapter Officer Tools ([Chapter Resources – NAWIC.ORG](http://www.nawic.org))
- ✓ Live and Recorded Educational Webinars
- ✓ Leadership Training





# Duties of Directors:

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The Board of Directors shall:

- A. Exercise general supervision and control over the business of the Chapter.
- B. Designate a depository for all Chapter funds and designate the third Officer authorized to countersign checks for withdrawal of funds from such depositories.
- C. Authorize payment of any indebtedness incurred on approved budget items.
- D. Adopt the annual budget of the Chapter.





# Duties of Directors:

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The Board of Directors shall (continued):

- E. Fill by ballot any vacancies occurring on the Board of Directors with the exception of the President and President-Elect. A vacancy in the office of Immediate Past President is not filled.
- F. Be authorized to create special committees.
- G. Shall present recommendations for action at regular Chapter meetings.
- H. Transact all other business of the Chapter not otherwise provided for.





# Effective Chapter Directors

## Seek to Do the Following:

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- ✓ Familiarize yourself with the material aspects of the organization –  
Section C
- ✓ Faithfully attend meetings
- ✓ Read materials and prepare for meetings
- ✓ Ask questions before, during and after meetings
- ✓ Exercise independent judgement
- ✓ Rely on appropriate sources of information
- ✓ Review minutes of the board
- ✓ Seek to stay informed as to legal obligations and good governance





# Parliamentarian:

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- W A Parliamentarian is appointed by the President, who advises the President or presiding officer, upon request.
- W Attends Board meetings as an advisor only and should be well informed on National Bylaws, National Policies, and *Roberts Rules of Order, Newly Revised*.
- W Has the duty to maintain a position of impartiality and therefore does not make motions, participate in debate or vote.
- W Serves as a procedural advisor for the President, the Board and members
  - At any time during the meeting, the President can pause (stand at ease) the meeting to consult the parliamentarian.
- W Offer a parliamentary opinion and advice on an issue
  - Does not have to wait until asked for advice





# Chapter Board Ethics

## Three Fiduciary Responsibilities:

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- W The Duty of Care – actively participate in board meetings and on committees to advance NAWIC’s mission and goals through chapter activities and initiatives.
- W The Duty of Loyalty – place the interests of the chapter ahead of your own interests at all times.
- W The Duty of Obedience – make sure the chapter is abiding by all applicable laws and regulations in carrying out the mission and purpose of NAWIC.





# Code Of Professionalism:

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- ✓ NAWIC members will act at all times in conformance with the following Association Policy: NAWIC is self-governing, non-profit, non-partisan and non-sectarian.
- ✓ NAWIC members will use their best efforts to ensure that the statements made, and positions taken fairly represent the view of the entire group on behalf of which they are authorized to speak.
- ✓ NAWIC members, when representing members of the Association, will take steps to hear and consider the views of all their constituents and make those members feel that their views are important, even if the position taken is in disagreement with any member's particular views.





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# Chapter Operation/Efficiency





# Key Motivators:

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# Organized Board Meetings - Before:

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## W Communicate in Advance

- Send agenda and supporting materials at least a couple of days before
  - If items aren't presented in time, they will be added to the next Board meeting unless it's an urgent matter.
  - Be prepared to discuss any items assigned to you.
- Scripts (expanded agenda): Sent to the V-P (in case something happens to the President, Secretary for taking notes and Parliamentarian).



# Organized Board Meetings - During:

W Start on time and do your best to end on time.

W Managing the Discussion

W Voting

W End with an Action Plan





# Organized Board Meetings - After:

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- W Summary of Actions (SOA): After every Board meeting have the Secretary put together a SOA to share with the members. The SOA is a brief synopsis of the actions of the meeting.
- W Action Minutes:
  - Decisions Made:
    - Motions passed or defeated
    - Reports/budget approved as presented or amended
  - Action Items: Specific tasks assigned along with deadlines
  - Next Steps: Follow-up actions or future meetings planned



# Small Board Procedures:

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- ✓ Members must obtain the floor before making motions or speaking, but can stay seated
- ✓ Motions do not need a second
- ✓ No limit to the number of times a member can speak to a question
- ✓ Informal discussion is permitted
- ✓ A vote may be taken without a motion
- ✓ The chair can stay seated while putting questions to vote
- ✓ The chair can stay seated while speaking during discussions



# Importance of Power (Soft) Skills:

- ✓ Soft skills, people skills, emotional intelligence refer to the ability to interact amicably with each other
- ✓ Personal attributes can affect relationships, communication and interactions with other board members
- ✓ Encourage open communication with each other on strengths and weaknesses



# Chapter Operation/Efficiency

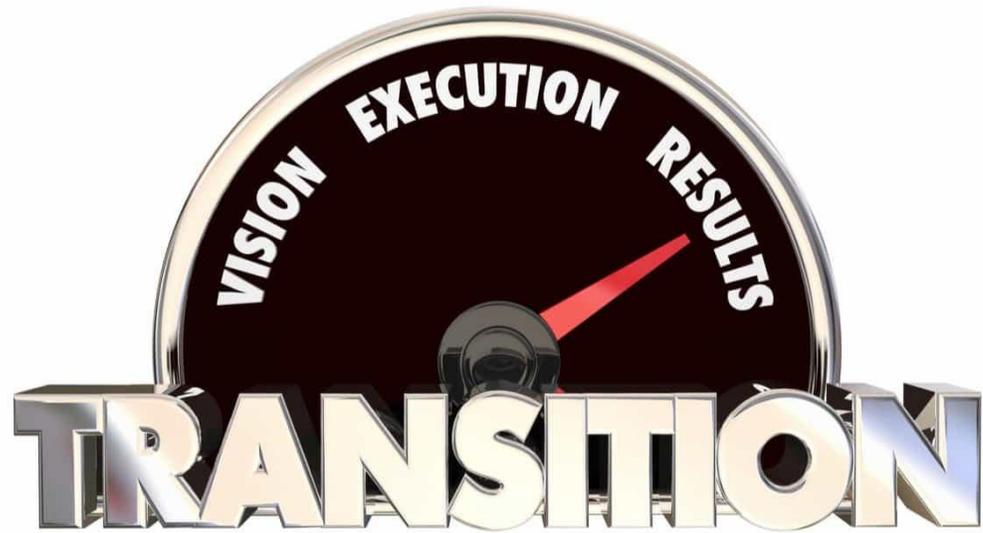
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W What ways can your chapter operate and run more efficiently?



# Chapter Operation/Efficiency

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- W ✓ Create a Succession Plan
- W ✓ Joint Board and Strategic Plan meeting
- W ✓ Share information with your successor
- W ✓ Have your successor shadow you
- W ✓ Keep the lines of communication open





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# Chapter Meetings / Quorums





# Chapter Meeting Requirements:

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## W Chapter Board Meetings, 6 per year

- This is where the majority of the chapter business should take place

## W General Membership Meetings, 10 per year

- Only 4 of the 10 meetings need to conduct business
- 75% of all Chapter programs and activities shall be construction-related

## W Virtual Meetings

- Voting can occur **EXCEPT** for Chapter elections





# Other Meeting Types:

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**W Special Board Meetings:** Only the President can call special Board meetings. If a Board member asks the President to call a special Board meeting, the reason for it must be told to the President.

**W Executive Session:**

- What are executive sessions?
- How do you conduct?
- What are the rules?
- Why should executive session minutes be brief?





# Quorums:

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## W Membership:

- 1/3 of the voting members of the Chapter shall constitute a quorum at any business or special meeting

## W Board:

- A majority of the Board of Directors shall constitute a quorum at any meeting of the Board of Directors





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# Bylaws / Standing Rules / Policies / Guidelines





# NAWIC

## A 501 (c) (6) Business League

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Bylaws, Standing Rules,  
Policies, Guidelines

*What's the difference?*



# Definitions

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## w/ Bylaw:

n. the written rules for conduct of a corporation, association, partnership or any organization.

Bylaws are, in effect a contract among members, and must be formally adopted and/or amended.

## w/ Standing Rule:

the rules of a society or organization for details of its government that are created by a majority vote and remain in force until repealed or annulled by a majority vote

## w/ Policy:

a course or principle of action adopted or proposed by a government, party, business, or individual

## w/ Guideline:

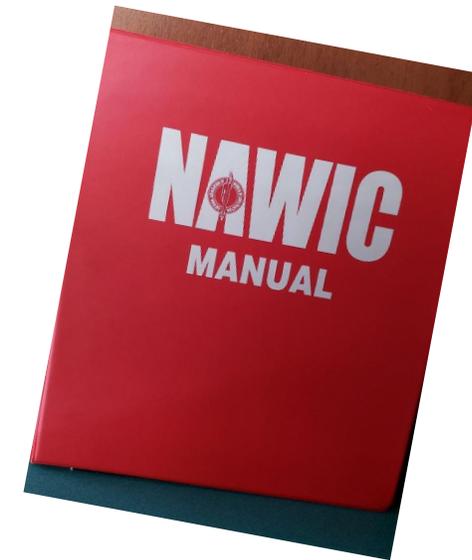
a general rule, principle, or piece of advice



# NAWIC's Operation Manual

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- W ✓ Section A: Association
- W ✓ Section B: Business
- W ✓ Section C: Chapter
- W ✓ Section D: NFSF (Dollars)
- W ✓ Section E: NEF (Education)
- W ✓ Section F: Committees, Procedures, Guidelines, Region  
Fund Policies, Forms



NAWIC is determined as a 501 (c) (6) Business League under the Internal Revenue Code, a not-for-profit entity, exempt from Federal Income Tax

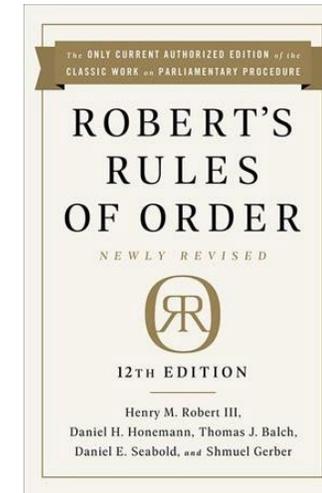


# Bylaws vs. Standing Rules

**Bylaws** are the most important:

- ✓ Rights of Members
- ✓ Power of the Assembly
- ✓ Power structure of the board and officers

*Roberts Rules of Order*, “Bylaws are the rules that [NAWIC] must follow.”



## Section A, Article XVII, NAWIC Operations Manual:

“The rules of parliamentary practice comprised in Robert’s Rules of Order Newly Revised, latest edition, shall govern all proceedings of the Association and of the Board of Directors, except where inconsistent with these Bylaws, and shall be subject to any Standing Rules which have been or may be adopted by the Association.”



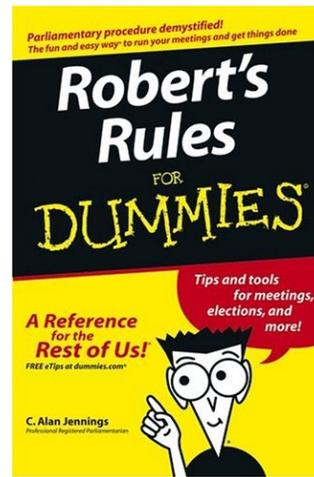
# Bylaws vs. Standing Rules

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**Standing Rules** offer flexibility, while adding more details, so that consistency flows from one year to the next, one president to the next.

Example: **Standing Rule #7:** Regular monthly meetings will be held on the second Wednesday of the month.

*This date may be changed at the discretion of the President and a majority vote of the Board to accommodate special circumstances or opportunities for Chapter members.*





# Policies vs. Guidelines

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## Section A, Article III – Policy

This Association shall be self-governing, non-profit, non-partisan and non-sectarian.

### Policies:

- ✓ It's the way we do things
- ✓ Standard Operating Procedures (SOPs)
- ✓ Outlines the directives for situations unique/relevant to the Association
- ✓ Disciplinary Procedures, Social Media, Expense Reimbursement





# Policies vs. Guidelines

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## **CHAPTER Policies:** 35 – 46, Section A (pages A-27-28)

*To ensure compliance with IRS regulations and requirements for 501(c)(6) designation, the NAWIC National Board of Directors shall have overall supervision of all Chapters*

Your chapter is subject to probation, if there is:

- W ✓ Failure to have representation at Annual Conference
- W ✓ Failure to have representation at Regional meetings
- W ✓ Failure to submit Standing Rules for review to National Bylaws Chair as required \*\*
- W ✓ Failure to submit 990 Postcard as required by IRS
- W ✓ Failure to hold required number of Chapter monthly meetings as required by Bylaws
- W ✓ Failure to follow NAWIC policies and guidelines as established by the NAWIC Board of Directors
- W ✓ *Any additional findings of the NAWIC Board of Directors in which a Chapter is out of compliance or in jeopardy with legal regulations*





# Policies vs. Guidelines

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## Guidelines:

- ✓ Suggestions to offer guidance for consistent actions
- ✓ Language to stay in check
- ✓ Everyone's on the same page
- ✓ Spring Forum, Fall Conference formats





# Policies vs. Guidelines

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***Time to Play:***

Policy or  
Guideline?



# Questions?

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## National Bylaws' Chairs Contact Information:

Catherine Schoenenberger, 2024 – 2025

[StaySafeTraffic@aol.com](mailto:StaySafeTraffic@aol.com) (978) 692-2114 (o) (508) 314-9485 (c)

Doreen Bartoldus, 2025 - 2026

[bartnawic@gmail.com](mailto:bartnawic@gmail.com) (917) 567-7594





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# Branding





# Branding:

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- W Brand Standards Guide
  - Logo Dos and Don'ts
  - Chapter Logos Template
  - Banner
  - Business Card
  - Marketing Tools

[NAWIC-Brand-Standards-Guide-R8-110920-with-Marketing-Tools-Links.pdf](#)



# Branding: Do's and Don'ts

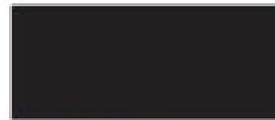
1.5" minimum width



2" minimum width



PMS 199  
c7 m100 y85 k1  
r219 g0 b50  
HTML DB0032



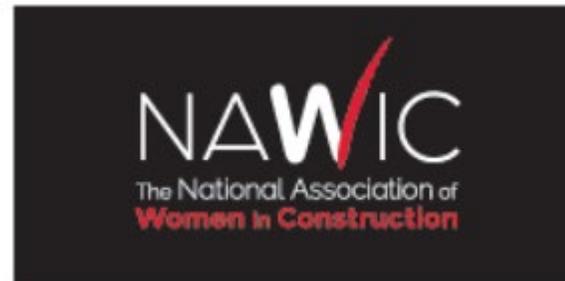
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r35 g31 b32  
HTML 231F20



50% Black  
c0 m0 y0 k50  
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HTML 939598



# Branding: Do's and Don'ts



# Branding: Chapter Logo Template

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**Northwest Arkansas**

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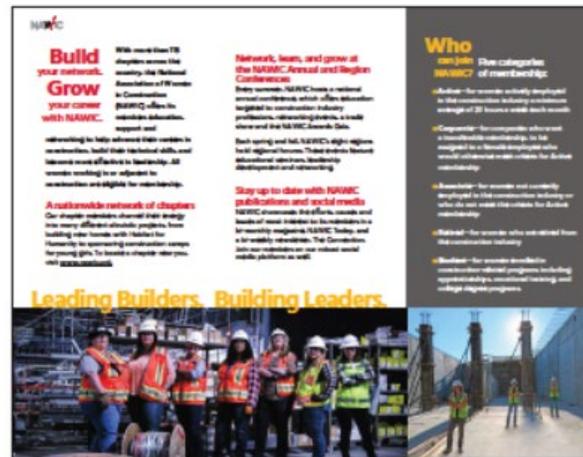
Raleway Bold  
100% Black

Chapter Logos



# Branding: Marketing Tools

- ✓ Membership Brochure
- ✓ (English and Spanish)
- ✓ Referral Card (English and Spanish)
- ✓ Prospect Pad
- ✓ Postcard (English and Spanish)





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# Social Media Policy / Branding





# Social Media Policy:

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- ✓ Why a Social Media Policy?
- ✓ Authorized Social Media Use
- ✓ What constitutes a Social Media Platform?
  - Social Networking Sites (e.g. Facebook, LinkedIn, MySpace, Google+)
  - Micro-blogging Sites (e.g. Twitter)
  - Blogs (Including company and personal blogs, as well as comments)
  - Video and Photo Sharing Websites (e.g. YouTube, Flickr)
  - Forums and Discussion Boards (e.g. Google Groups, Yahoo! Groups)
  - Online Encyclopedias (Wikipedia, Sidewiki)
  - Snap Chat



# Social Media Branding: Profile Naming

## FACEBOOK INFO

**NAWIC Chapter Name - Chapter Number**

Example:  
**NAWIC Alaska - Chapter 197**

**Bio Info:**

Include mission state and core purpose.  
Restate chapter number. Add location.  
Add any/all contact info. Link to website.

## YOUTUBE INFO

**NAWIC Chapter Name - Chapter Number**

Example:  
**NAWIC Alaska - Chapter 197**

**Bio Info:**

Include mission state and core purpose.  
Restate chapter number. Add location.  
Add any/all contact info. Link to website. If  
second link is an option, link to [nawic.org](http://nawic.org).

## LINKEDIN INFO

**NAWIC Chapter Name - Chapter Number**

Example:  
**NAWIC Alaska - Chapter 197**

**Bio Info:**

Include mission state and core purpose.  
Restate chapter number. Add location.  
Add any/all contact info. Link to website. If  
second link is an option, link to [nawic.org](http://nawic.org).

## INSTAGRAM INFO

**NAWICChapterNameChapterNumber**  
or  
**NAWICChapterNameNumber**

Example:  
**NAWICAlaskaChapter197**  
or  
**NAWICAlaska197**

**Bio Info:**

Optional but optimal: Format bio in  
bulleted list with emojis  
  
Restate chapter number. Add location.  
Add mission. Link to website.

## TWITTER INFO

**NAWICChapterNameChapterNumber**  
or  
**NAWICChapterNameNumber**

Example:  
**NAWICAlaskaChapter197**  
or  
**NAWICAlaska197**

**Bio Info:**

Optional but optimal: Format bio in  
bulleted list with emojis  
  
Restate chapter number. Add location.  
Add mission. Link to website.



# Social Media Branding: Profile Images



Lima, OH / Ft. Wayne, IN

FACEBOOK COVER PHOTO

1640 x 924 px



LINKEDIN COVER PHOTO

1128 x 191 px



YOUTUBE COVER PHOTO

1546 x 423 px



TWITTER COVER PHOTO

1500 x 500 px



# Social Media Branding: Post Design Elements

## BRAND COLORS



PMS 199  
c7 m100 y85 k1  
r219 g0 b50  
HTML DB0032



100% Black  
c0 m0 y0 k100  
r35 g31 b32  
HTML 231F20



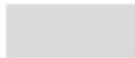
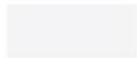
50% Black  
c0 m0 y0 k50  
r147 g149 b152  
HTML 939598

## COMPLEMENTARY BRAND COLORS

Complementary colors are authorized to be used in addition to standard brand colors - they should never replace brand colors or be used when brand colors are not represented on creative.



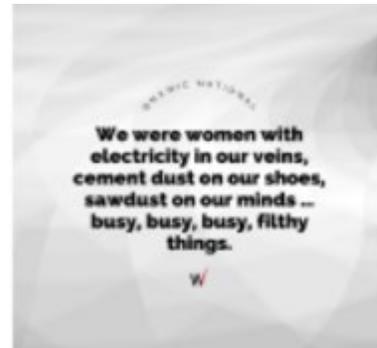
white



grey color family



transparent red & black



## FONT FAMILIES

Fashion Fetish Light

**Raleway Bold**

Raleway Light

***Raleway Bold Italic***

*Raleway Italic*

- primary font family

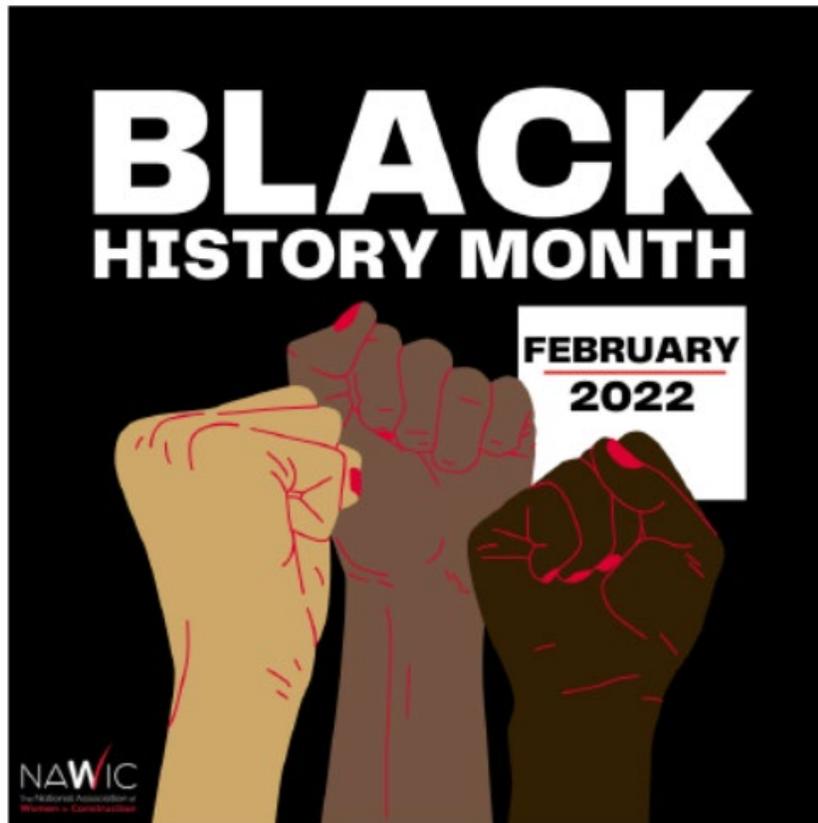
## SPLASH FONTS

A total of **one** additional font may be used in NAWIC social media communications if and when necessary for artistic direction. This font choice can change from piece to piece. The font must be accompanied by at least one of the primary font families.

Examples:



# Social Media Branding: Logo Representation



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# Break





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# Chapter Finances: Tax Status





# NAWIC's Tax Status:

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## § 501 (c)(3)

- ✓ Organized and operated religious, charitable, scientific or educational purpose
- ✓ Exempt from federal income tax (must file 990)
- ✓ Eligible for exemption from local sales tax
- ✓ Donors can deduct their contributions
- ✓ Activities limited to those that support religious, charitable, scientific or educational purposes
- ✓ Cannot intervene in political campaigns and lobbying cannot be a primary purpose

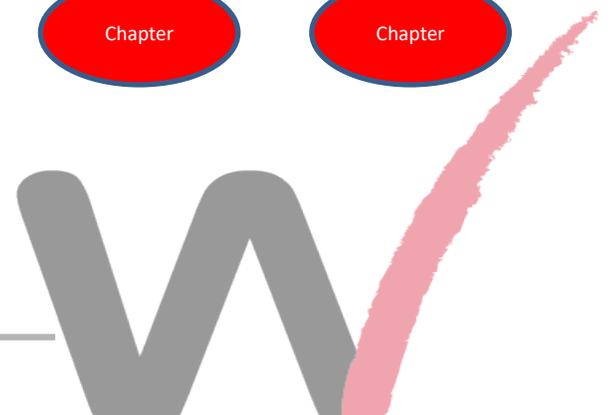
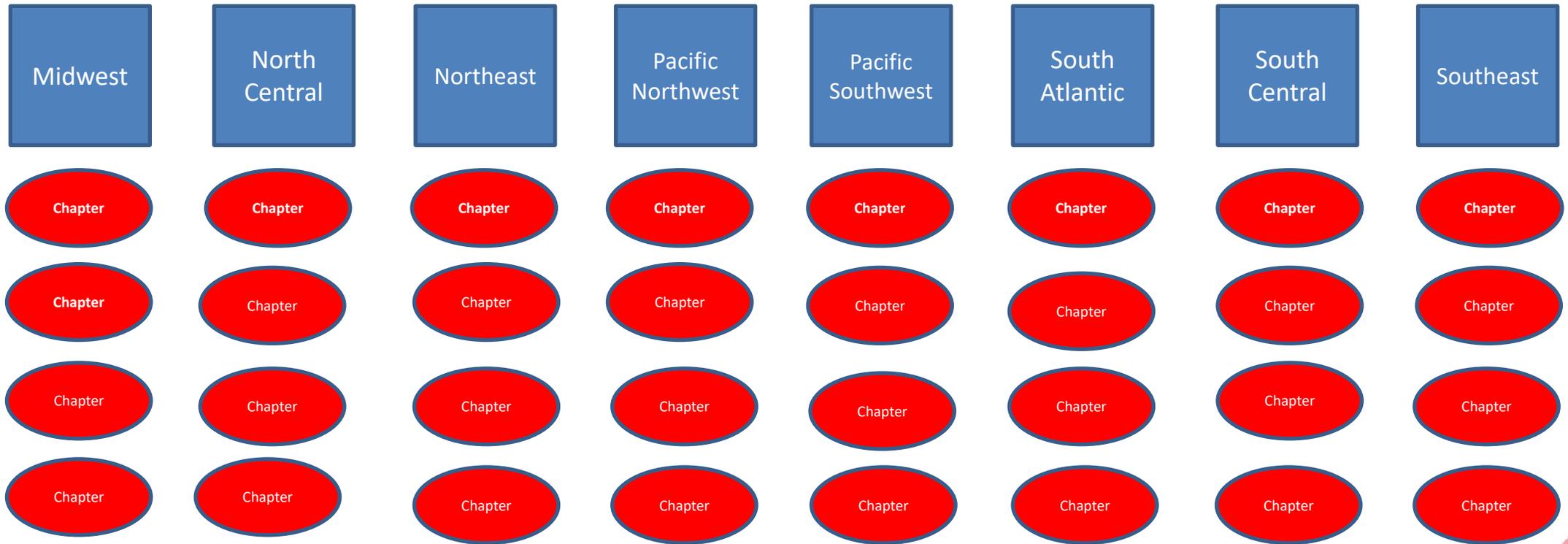
## § 501 (c)(6)

- ✓ Association of persons with a common business interest – promotes the common interest and does not conduct a regular trade/business or provide “particular services” to individual persons
- ✓ Exempt from federal income tax (must file 990)
- ✓ Not eligible for exemption from local sales tax (Most states)
- ✓ Donors may not deduct contributions as charitable contributions
- ✓ May pursue all activities by a 501 (c)(3) organization as well as activities that are not charitable, educational, etc. but are directed to the business conditions of the line of business/profession





# National, Regions & Chapters Relationship:





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# Chapter Finances: IRS Requirements





# IRS Requirement - Filing 990:

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- ✓ Annual return regarding your tax-exempt purpose and status
- ✓ Done after the Treasurer files for that year have been audited
- ✓ IRS requires each Chapter to file a 990
- ✓ E-postcard is filed if gross receipts are normally \$50,000 or less
- ✓ If in existence for 3 years or less and averaged \$60,000 or less during each of 2 first tax years
- ✓ If at least 3 years old and averaged \$50,000 in gross receipts for the immediate preceding 3 tax years



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# Chapter Finances: Audit



# Audit:

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- ✓ Outgoing President appoints the audit committee
- ✓ Must be done annually
- ✓ Verifies proper record keeping, handling of funds, and donations are used as stipulated
- ✓ Should be done within 30 days after the close of the NAWIC year
- ✓ After the audit is complete, it's a great time to file the Chapter's 990





# Audit Evaluation/Documentation:

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## Evaluation:

- ✓ Accounting controls are adhered to
- ✓ Segregation of duties
- ✓ Systems and procedures are in place
- ✓ Adequate insurance coverage
- ✓ Donor's stipulations are recorded and adhered to

## Documentation:

- ✓ Check register
- ✓ General Ledger or Summary of Accounts
- ✓ Bank statements
- ✓ Budget
- ✓ Copies of deposits, both cash and electronic (PayPal, Square, etc.)
- ✓ All invoices or expense reimbursement requests



# Audit Procedure:

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- ✓ Verify 1-2 checks from each month
- ✓ Verify 1-2 deposits from each month
- ✓ Choose 2 bank statements to verify accuracy
- ✓ Prepare audit report for Board
  - WHEN THIS COMMITTEE HAS FINISHED AUDITING, a written statement should be prepared and sent to the Chapter President with a copy retained in the Treasurer's files. It might say, "The Audit Committee has studied the Chapter records for fiscal year \_\_\_\_\_ and found them to be in good order." You might then make whatever recommendations necessary for the future of the chapter.
  - In addition, an oral report on the findings of the Audit Committee shall be given at the next board meeting following the audit so it appears in the board minutes.





# Additional Items:

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- ✓ W-9 should be filled out each year ([www.irs.gov/pub.irs-pdf/fw9.pdf](http://www.irs.gov/pub.irs-pdf/fw9.pdf))
- ✓ Chapter records should be maintained for a period of not less than 5 years
- ✓ All tax returns and IRS documents should be kept according to policy
- ✓ Always work in the best interests of the Chapter and the Association
- ✓ When in doubt, read the Treasurer's Handbook





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# Chapter Finances: Budget





# Budget:

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- ✓ Put together by the Finance Committee
- ✓ Should start after Chapter elections
- ✓ Is the road map for your Chapter's success
- ✓ Is not a simple process and not to be taken lightly
- ✓ Approved by the Board
- ✓ Should align with the Chapters strategic plan
- ✓ It's a living document and can be changed
- ✓ Be realistic



\*\*Percent calculation is Member Support & Programs Services expenses divided by Member Support & Program Services Income.

Member Support & Program Services Income should cover at least **50.1%** of the Member Support & Program Services Expenses.

# Budget:

National Website Link: [Chapter Budget vs Actual Template](#)

REVENUE	YTD Actual	Budget	Rationale	EXPENSES	YTD Actual	Budget	Rationale
<b>Member Support Revenue</b>				<b>Member Support Expenses</b>			
<b>Dues</b>				Advertising (Print/Website/Newsletter, etc)	\$0.00	\$0.00	
Chapter Dues - Active Renewals	\$0.00	\$0.00	X Renewals @ \$\$	<b>Membership Promotions</b>			
Chapter Dues - Corporate Renewals	\$0.00	\$0.00	X Renewals @ \$\$\$	Meetings - Membership (NAWIC or no Speakers)	\$0.00	\$0.00	
Chapter Dues - Associate Renewals	\$0.00	\$0.00	X Renewals @ \$\$\$	Meetings - Industry Appreciation (member company)	\$0.00	\$0.00	
Chapter Dues - Student Renewals	\$0.00	\$0.00	X Renewals @ 25.00 (Set by National)	Professional Development & Education (PD&E) for members	\$0.00	\$0.00	
Chapter Dues - Retired Renewals	\$0.00	\$0.00	X Renewals @ \$\$\$	Membership Promotions - Promotional Items	\$0.00	\$0.00	
Chapter Dues - Active New	\$0.00	\$0.00	X New @ \$65	Membership Promotions - WIC Week	\$0.00	\$0.00	
Chapter Dues - Corporate New	\$0.00	\$0.00	X New @ \$140	New Chapter Start Up (seed money)	\$0.00	\$0.00	
Chapter Dues - Associate New	\$0.00	\$0.00	X New @ \$65	<b>Fundraisers</b>			
Chapter Dues - Student New	\$0.00	\$0.00	X New @ \$0 (Set by National)	NAWIC Table Sales - to Members	\$0.00	\$0.00	
Chapter Dues - Retired New	\$0.00	\$0.00	X New @ \$0	Construction Related	\$0.00	\$0.00	
<b>Member Meetings</b>				<b>Officer Expenses</b>			
Chapter Meeting Revenue (NAWIC or No Speaker)	\$0.00	\$0.00	10 Months @ \$\$ * X number of average members	President Expenses	\$0.00	\$0.00	
Meetings - Industry Appreciation (only member companies)	\$0.00	\$0.00		Past President's Pin	\$0.00	\$0.00	
<b>Chapter Fundraisers</b>				D & O Insurance	\$0.00	\$0.00	
Contributions - Corporate Sponsorships (member company)	\$0.00	\$0.00		<b>Regional Expenses</b>			
Contributions - Member Support	\$0.00	\$0.00		Region Forum Representative(s)	\$0.00	\$0.00	
Sold to Members	\$0.00	\$0.00		Region Fall Conference Representative(s)	\$0.00	\$0.00	
NAWIC Table Sales (sold to members)	\$0.00	\$0.00		Region/Director Fund	\$0.00	\$0.00	\$\$ per member x ## members
Construction Related	\$0.00	\$0.00		<b>Annual Conference Expenses</b>			
Advertising - Website/Newsletter (member Company)	\$0.00	\$0.00		Annual Conference Representative(s)	\$0.00	\$0.00	
<b>Total Member Revenue</b>	\$0.00	\$0.00		<b>General and Administrative Expenses</b>			
<b>Program Services Revenue</b>				Postage	\$0.00	\$0.00	
				Office Supplies	\$0.00	\$0.00	
				Records Storage	\$0.00	\$0.00	
				Treasurer's Bond	\$0.00	\$0.00	





# Budget Revenue/Expenses Categories:

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## W Member Support

- Activities directly related to members and member companies

## W Program Services

- Activities that are directly related to the association's tax-exempt purpose.

## W Unrelated Business

- Activities undertaken by the chapter that are not directly related to the chapter's tax-exempt purpose. Net income generated may be taxable. However, there are specific exceptions to taxation. It does not matter if the income is used for the chapter's exempt purpose activities - it is the activity itself that determines taxation.



**Member Support & Program Services Income should cover at least 50.1% of the Member Support & Program Services Expenses**





# Budgeted Revenue/Income:

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## W Member Support Revenue

- Membership dues (how many renewals/new members in what categories)
- Member and/or member company sponsors (how many at what levels)
- Chapter meeting revenue – NAWIC related or No speaker
- Industry Appreciation – only member companies

## W Program Services Revenue

- Non-member company sponsors (how many at what levels)
- Chapter meeting revenue – construction related speaker
- Industry Appreciation – non-member companies

## W Unrelated Business Revenue

- Bank/Investment Interest

## W Fundraising

- Can go in each of the categories depending on the fundraising activity



# Fundraising:

- ✓ Governed by state law – consult local counsel
- ✓ States may require registration to raise funds
- ✓ Some states may treat trade associations differently under their fundraising laws
- ✓ Online fundraising requires extra caution as you may be dealing with individuals in other states
- ✓ **BOTTOM LINE:** Caution when raising funds from outside your membership!





# Budgeted Expenses:

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- W Region Director's expenses
- W Expenses to send members to events
- W Committee expenses
- W Professional Development and Education
- W Newsletters, advertising, networking, website
- W Insurance:
  - Directors and Officers
  - Crime Coverage
  - Special Events





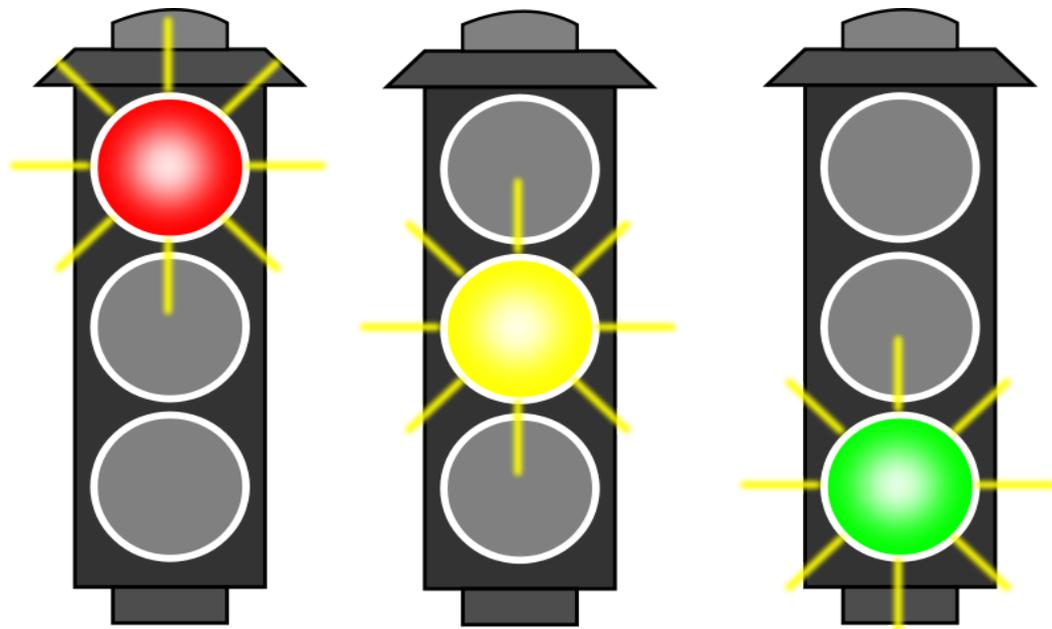
# Directors & Officers Liability:

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- W Coverage Grant:** Directors & Officers (D&O) Liability insurance (aka Management Liability) provides coverage for defense costs and damages (awards and settlements) arising out of actual or alleged wrongful act allegations and lawsuits brought against an organization, its board of directors, officers or employees for their actions in their capacity as an Insured of the company.
- W Pricing:** Rating based on total assets, employee/volunteer count, revenue, financial condition



# Special Events Insurance:





# Release & Waiver of Liability Form:

## Release and Waiver of Liability

Event \_\_\_\_\_  
 Name \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Cell \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Emergency Contact Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Cell \_\_\_\_\_

I hereby release, indemnify, and hold harmless \_\_\_\_\_, and its directors, officers, employees and agents from any and all liability claims, demands and causes of action, of whatever kind or nature (including any injury caused by negligence)) incurred in conjunction with my participation in the activity described above.

Signature \_\_\_\_\_ Date \_\_\_\_\_

IF PARTICIPANT IS UNDER 18 YEARS OF AGE, PARENT OR LEGAL GUARDIAN MUST SIGN BELOW.

Adult Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Relationship to minor \_\_\_\_\_

A copy of the release is included with the Special Events Insurance Request





# Items Needed for Proper Record Keeping:

- ✓ Detailed deposit slips
  - Include the deposit receipt from the bank
  - Include copies of the checks if possible
- ✓ Completely filled out expense reimbursement request
  - Include all itemized receipts for reimbursement
  - Can be found on NAWIC in the Treasurers Handbook



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# Lunch / Networking



# National President's Report

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- ✓ Theme: Together We Rise
- ✓ Leadership Day planned to enhance your professional journey
- ✓ Embrace every opportunity – connecting, learning, exchanging ideas
- ✓ Take the knowledge and inspiration back to your chapters, workplaces, and communities
- ✓ Thank-You to volunteers who contributed to make this day possible
- ✓ Together We Rise – stronger, more connected and ready to lead!



# Questions / Open Discussion:

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