

HANDBOOK

# Starting a New WTS Chapter



Advancing women  
Advancing transportation

# Starting a New WTS Chapter

Starting a WTS Chapter is an exciting time for an area. It's the beginning of a connection to a great organization where the cliché holds true, the more you give the more you get. A successful Chapter includes a mix of people, professions and genders and the more diverse a Chapter becomes, the more resources available to pull. This is very important to a volunteer-based organization.

This document provides an overview of the steps required to form a Chapter. In order to be approved by WTS International, the prospective Chapter must submit the following documents:

- Articles of Incorporation applicable to the prospective Chapter's country's/province's/locality's law
- By-Laws of the prospective Chapter
- Letter to the WTS international Chair
- List of acting officers for the prospective Chapter
- 20 paid WTS members

## Step 1: Develop a Core Group

The first step is to establish a core group of people. If you have not done so already, call 15 to 20 people that you know to gauge interest in developing a Chapter. Once you have about 10 people interested, hold a meeting to discuss the possibility of a Chapter in your area. After identifying your core group of members, appoint one person as Acting Chapter President of the developing Chapter.

This core group should keep a few questions in mind as the process begins, such as: Who will be our members? How much support will our members get from their employers? Will they be allowed to go to programs without taking time off? Will their dues be paid for by their employer? What would happen to your Chapter if one agency decides to no longer support WTS activities? Does the geographic layout facilitate attendance at meetings? Where and when are you going to host programs (morning, lunch time, evening)?

Most likely, several issues and challenges will come up as you discuss starting a Chapter. Be realistic in your planning. Your core group should have members with diverse backgrounds, from both the public and private sector agencies and companies, and people who have energy and drive to volunteer time and commitment. A best practice involves at least three agencies in some manner. You can consider starting with individuals from the State Department of Transportation, an airport authority and regional transit authority in addition to a few consulting firms. Three varying modes of transportation have been a successful strategy.

The core group should give some attention to naming the Chapter. In many cases, the name reflects the major city where most of the members live and activities will occur. In some cases, the name of a Chapter reflects an area. It's important to use a name that best reflects the intent and geography.

If after your initial planning meeting, the core group decides there is support for a Chapter, then the next step is to assign responsibility for crafting the bylaws, managing the paperwork for the Incorporation process, and recruiting members.

## Step 2: Recruit Members

The developing Chapter will need 20 paid WTS members to be certified. The Chapter start-up team should be a resource body of connections to make initial contacts. The key to a successful recruitment effort is to involve as many modes and interests as possible. The more diverse the core group, the greater the opportunity to attract members from all areas and all disciplines of transportation. This will avoid the likelihood of one interest group as dominant. WTS is known for its sense of inclusion and a place for opportunity.

**Become a Member:** [Link to WTS Membership website](#)

With this in mind, the following are some suggestions for recruiting members.

### Word of Mouth

In addition to women and men in your own agency or company, most of us know people in many parts of the industry who would be interested in joining WTS. These personal and professional contacts are a valuable in securing potential WTS members and should be cultivated early in the setup process.

### Generate a Leader List

Generate a list of leaders across all Transportation agencies and companies in your area. Develop a relationship matrix between your core planning group and the names on the list to determine who knows who and would volunteer to contact the individuals. In some cases, the core group may not have a personal connection. This is okay because this list will be a valuable mailing list in the future. Remember, you're working on capturing 20 paid members so a list of 40-60 names is a great start.

### Write a Letter

A well-written introduction letter from an executive level transportation official will provide prospective members with the knowledge that WTS is being supported at the top. A sample letter of introduction is included in the Appendix.

### Modes with a Presence

WTS prides itself on providing knowledge, education and professional development opportunities across all areas of the Transportation industry and within all disciplines. An important exercise is identifying all modes that have a presence in your area. These will become target contacts for programming and recruiting members as your Chapter takes shape.

- State and City Government Agencies
- Transit Agencies
- Railroads
- Airport Authorities and Airlines
- Maritime and Port Authorities
- Trucking
- Logistics

Additional sources include:

- Consulting firms
- Construction Contractors and Suppliers

- Large manufacturing or distribution companies to transportation
- Colleges and universities, specifically those with a transportation, urban planning or civil engineering curriculum.

### Follow-Up

The value of following up is a crucial part of your start up efforts. For example, if a potential member is invited to one of your start up programs and does not attend, follow up with a call or email inviting the individual to the next meeting. It's important to talk and connect with everyone who attends your start up programs so they feel their time invested has value. A follow-up call or email thanking them for their attendance is highly suggested in this process. And, perhaps you could ask for their feedback on the program. This is a good time to remind them to visit the website for becoming a member. First impressions are important and will go a long way toward establishing the credibility of WTS in your community.

Website: [Link to WTS website](#)

## Step 3: Begin the WTS Chapter Certification Process

### Articles of Incorporation and Tax ID number

You will be establishing WTS as a 501(c)(6) entity in your state. The IRS website explains that the Section 501(c)(6) of the Internal Revenue Code provides for the exemption of business leagues, such as WTS, which is not organized for profit and no part of the net earnings of which inures to the benefit of any private shareholder or individual. Not-for-profit entities help bolster business conditions in sectors, often acting as trade associations that promote a common interest.

To be incorporated, you will need to research the process in your state (typically start through the Secretary of State office) and then provide WTS International with all the required documentation. Below are the steps to consider for obtaining your articles of incorporation. Note: identify a few sponsors of the Chapter to help cover up front costs. They are usually minimal and vary from state to state.

1. The paperwork will most likely request a purpose of the 501(c)(6). Use the mission statement from the WTS international Strategic Plan to indicate the purpose.
2. Organize a board of directors. Via personal and group interviews, ensure that each board member has the proper background, experience and perspective to lead your business league. Each state requires a different number of board members for 501(c)(6) organizations, but most states require a minimum of three.
3. Complete and submit IRS Form SS-4 to obtain an employer identification number (EIN). Pay all associated filing fees.
4. Obtain Articles of Incorporation for a nonprofit organization from your State Secretary or Attorney General's office. The Secretary of State's office should be able to direct you more specifically and direct you to the proper forms (which are usually available on the state government website). Complete the articles and file them with the State Secretary or Attorney General, paying any required fees along the way.
5. Apply for tax-exempt status by filing IRS Form 1024, "Application for Recognition of Exemption Under Section 501(a)," which also applies to 501(c)(6)s. Include a completed copy of IRS Form 8718, the "Exempt Organization Determination Letter Request." Have someone with the power of attorney sign the application, include proof of your EIN, submit the forms and pay the associated fees.

6. Get in touch with your local, county and state departments of revenue. Ask about filing for tax-exempt status on each level, and follow the given instructions. Each department of revenue determines its own application process, so procedures may vary.
7. File a Statement of Information form. You will need to file a Statement of Information form in some states. This document must be filed a few months after the initial filing of the articles. Some states require that a Statement of Information form be filed each year following the incorporation. Check the Secretary of State's website to see whether the form is required in your state. This form can usually be submitted online and includes fairly basic information about the corporation; think of it as a company census you must complete every year. It usually includes:
  - Names and addresses of executive committee (President, Vice President, Treasurer, Secretary)
  - Members of the board
  - Vacancies or changes in leadership
  - Mailing and street address of the Chapter (find a volunteer entity to allow use of their address)

## Bylaws

The second requirement is the adoption of Chapter Bylaws. Bylaws are the rules that are adopted for conducting your Chapter's business. Included in these Bylaws are articles that define items such as the responsibilities of the Board of Directors, membership meetings and voting procedures. A dissolution procedure is also included. Every Chapter has varying committee structures and procedures. We do suggest keeping your Bylaws from being too specific.

Using the sample Chapter Bylaws template, the forming Chapter leaders are to initiate the establishment of the chapter's bylaws. The WTS International Office hosts the current version of the template.

Under the WTS International Governance Committee, there is a Chapter Bylaw Committee that holds the responsibility to review forming Chapter Bylaws prior to ratification.

The leaders of the new Chapter will meet with the WTSI Bylaw Committee to hear observations of their proposed bylaws, offer best practices and discuss any questions.

The review process for your Chapter Bylaws is as follows:

1. When Forming Chapter leaders have drafted their bylaws, they are to send them to the Chair of the WTSI Governance Committee and the WTSI Executive Director. This will initiate the review process.
2. The Chair of the Governance Committee or WTS International Staff member will distribute the proposed amendment document from the Chapter to the Chapter Bylaw Committee. A meeting will be scheduled and the committee will review the proposed changes and develop a list of observations.
3. A conference call is then scheduled between the Chapter Bylaw Committee and leaders from the Chapter in review to share the observations and discuss best practices.

NOTE: If Bylaws are required for the establishment of a Chapter's Articles of Incorporation with their State or Province, the review of the Chapter's Bylaws should occur prior to submission.

## Officers

You will need to appoint officers, which include Chapter President, Vice President, Treasurer and Secretary. For the application process, it is not necessary to have in place committee chairs, however it is highly recommended someone is

identified for membership and programs. As your Chapter grows, you can begin to expand the number of committee chairs to suit your needs.

## Step 4: Submit Paperwork to WTS Office

The WTS International Board meets in person quarterly and also via teleconference calls on a monthly basis. You may submit the required documents electronically at any time during the year. The packet of documentation must be received by the WTS International office at least two weeks prior to a monthly Board call or three weeks prior to an in-person Board meeting.

The packet must include:

- Cover letter from appointed Chapter President to the WTSI Chair
- Incorporation papers
- Bylaws (*reviewed with WTSI Chapter Bylaw Committee*)
- List of Chapter Officers
- List of 20 paid WTS members.

A checklist is included in Appendix 1.

As the final step, the WTS International Board will review the packet and approve ratification if all requirements are met. If there is an issue, the acting President will be contacted to further discuss the concern. You will then have the opportunity to resubmit the paperwork once the concern is addressed.

Upon Chapter approval, your Board will continue to establish routine Board meetings, monthly or quarterly programs, professional development activities and much more.

## Step 5: Get Support from the broader organization

WTS has a Region Council model where groupings of Chapters based on geography are connected. Each professional Chapter has a representative on the Council. An element of the Region Council Charter is to support the development and onboarding of new Chapters. The Council is an excellent source for you to tap and ask questions. The power of WTS is the willingness to help and support its sister Chapters. It is highly recommended to use the Council to help with recruiting members, learning the ropes of other Chapters who recently became certified and getting ideas for programs and professional development. Contact information for each Region Council can be found on the WTS website.

The WTS International Board of Directors is another viable resource for startup Chapters. Members of the Board can help provide direction and answer any question that comes up. The Board will help get you connected to public sector officials in your area. Most Board members have a wide network of connections and can be very advantageous in this effort. Contact information of the Board members can be obtained from the WTS office or on the WTS website.

# APPENDIX 1

## CHECK LIST

### Documents to submit to the WTS International Office for ratification approval

- Cover letter to WTS International Board Chair
- Paperwork for articles of incorporation from your state
- Chapter Bylaws reviewed by WTSI Bylaw Committee
- List of Officers appointed, include all contact information
- List of twenty (20) members (or more) who have joined WTS

## APPENDIX 2

### SAMPLE LETTER/EMAIL OF INTRODUCTION

Dear < name> (use appropriate salutation):

Exciting news! We are launching a WTS Chapter in <location> and we would like to invite you to join us at our inaugural program to learn more about the organization and possibly get more involved in the start up effort.

WTS stands for achieving equity and access for all women in the Transportation industry. The organization was founded in 1977 and is dedicated to building the future of transportation through the global advancement of women. Today, WTS has over 8,000 members strong with more than 64 professional chapters around the globe. Education remains a primary focus of what we do. And, we are much more than that. WTS provides access to the highest levels of the transportation industry, sponsors monthly programs on relevant topics and networking events, and WTS provides mentoring and professional development. Women leaders of today are providing guidance and feedback to female and male leaders of tomorrow.

<include program meeting details....time, date, location, speaker info, registration information, deadline to sign up, etc>

If you would like to talk about WTS in advance of this program, please let me know. I will follow up to make arrangements. Thank you for your leadership. We look forward to seeing you on <date>.

Sincerely,

<your name>

<connection to WTS (title)>

Contact information