



2023 Chapter Leadership Development Agenda

Renaissance Newport Beach | Newport Beach, CA
November 15-16, 2023

| Wednesday, November 15 (all times listed are PT) | |
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| 7:15am-8:00am | Breakfast and Networking |
| 8:00am-9:00am | Welcome |
| 9:00am-10:15am | Board Panel Discussion |
| 10:15am-10:30am | Networking Break |
| 10:30am-12:00pm | <p>Chapter Presidents and Chapter Vice Presidents Workshop</p> <p>During this workshop, participants will delve into the essence of leadership, empowering Chapter Presidents and Vice Presidents to enhance their effectiveness in leading their chapters and fostering a successful leadership model. This workshop will connect chapter business plans to the overall WTS strategic plan, highlight the organization's top priorities, and discuss chapter challenges and growth opportunities. This workshop is open to current and incoming Chapter Presidents and Vice Presidents.</p> |
| 10:30am-12:00pm | <p>Best Practices for Chapter Administration</p> <p>This session will provide an overview of the membership processes housed in MyWTS: sending emails, creating events, and managing Chapter rosters. After the overview, session attendees will practice implementing these items with support from the membership team. A laptop computer is highly recommended for this session. This workshop is open to all chapter leaders, with a specific focus on membership chairs, programming chairs, and those leaders that are utilizing the WTS systems.</p> |
| 12:00pm-1:00pm | Networking Lunch |
| 1:00pm-1:45pm | State of the Association |
| 1:45pm-3:15pm | <p>Programming for Success</p> <p>This session will highlight the importance of a holistic approach to Chapter program planning, including event and contract negotiation, planning, speaker management, on-site logistics, scripting, and member engagement. This workshop is open to all Chapter leaders, with a specific focus on programming chairs, communication chairs, and those involved in aspects of event planning or management.</p> |
| 1:45pm-3:15pm | <p>Secretaries & Treasurers Workshop</p> <p>This session will discuss how to create and appropriately maintain a Chapter's records, meeting agendas, and minutes during Board and membership meetings including agenda and minute approval and proper communication distribution. Basic accounting tips and a review of the overall responsibilities of the treasurer's role and a discussion of how to appropriately maintain the</p> |

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| | Chapter's financial records and how to prepare Chapter budgets will be covered. This session will walk through closing and producing monthly Chapter financial statements. This session will provide a deep dive into tax preparation and how to file required tax forms to the IRS. This session is intended for current or future treasurers and secretaries. | |
| 1:45pm-5:00pm | <p>WTS International Office Hours</p> <p>CLD attendees can schedule 1:1 meetings with WTS International staff to discuss Membership & Systems-related topics to include:</p> <ul style="list-style-type: none"> • Accessing and manipulating membership reports, reviewing quarterly reports, processing honorary memberships, creating/renewing chapter-paid & sponsored memberships, and Chapter Circle of Excellence criteria. • Chapter leader event reports, improving member connections, use of membership and chapter administrative systems, and updating member profiles. • Chapter challenges, discussions, concerns. <p>Pre-registration is <u>required</u>. More information to follow. Walk-ins will be accepted on a case-by-case basis if time allows.</p> | |
| 3:15pm-3:30pm | Networking Break | |
| 3:30pm-5:05pm | Chapter Best Practices | |
| | <p>Membership & EDI Best Practices</p> <ul style="list-style-type: none"> • 3:30-3:50: Improving Public Sector Involvement, Mara Kirby, President & Mary Lou Kutska, Vice President, Greater Chicago Chapter • 3:55-4:15: Stay Inspired – Maintaining a Sustainable and Resilient Chapter, Stephanie Blanco, President & Alma Valencia, Treasurer, Inland Empire Chapter • 4:20-4:40: ID&E through Action, Jessica Saleh, EDI Chair & Lauren Doyle, Communications Chair, Pittsburgh Chapter • 4:45-5:05: Bringing Equity, Diversity, and Inclusion to the Forefront, Jewel Juarez, EDI Chair & Avery Wilson Simao, Vice President San Antonio Region Chapter | <p>Programming Best Practices</p> <ul style="list-style-type: none"> • 3:30-3:50: Revamping a Transportation YOU Program, Shannon Gonzales, TransportationYOU Chair & Eric Meisgeier, TransportationYOU Chair, San Diego Chapter • 3:55-4:15: Making it persona-L: how developing attendee personas helped curate more diverse programming and participation, Teri Marsh, President & Kelly Cheeseman, Northwest Region Council Vice Chair, Seattle/ Puget Sound Chapter • 4:20-4:40: Hosting an Effective Laddered Networking Program, Mary Lou Kutska, Vice President, Greater Chicago Chapter • 4:45-5:05: Maximum Impact, Minimal Effort: Repurposing Chapter Communications for Success, Nicole Moon, Communications Chair, Metro Phoenix Chapter |
| 4:45pm-5:15pm | <p>Annual Awards and Scholarships Process Update and Reminders</p> <p>An overview of the guidelines for the 2023-2024 scholarship and award review and selection process will be provided to ensure WTS Chapters and WTS</p> | |

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| | International are aligned for the 2024 WTS Annual Conference. Participants will discuss how to evaluate optimal timings of both Chapter and International awards to best suit the organization's overall goals and typical cycle of a student's educational path. |
| 5:30pm-7:30pm | Networking Reception |
| Thursday, November 16 (all times listed are PT) | |
| 7:15am-8:00am | Breakfast and Networking |
| 8:00am-9:00am | 2024 WTS Priorities |
| 9:00am-10:00am | WTS Foundation and Transportation YOU Update |
| 10:00am-10:15am | Networking Break |
| 10:15am-11:15am | Acquisition & Retention: How to Grow & Maintain Membership During this session, attendees will receive in-depth membership growth strategies that can boost membership numbers within the chapter and tips that will assist with elevating membership renewals. |
| 10:15am-12:00pm | WTS International Office Hours CLD attendees can schedule 1:1 meetings with WTS International staff to discuss Membership & Systems-related topics to include: <ul style="list-style-type: none"> • Accessing and manipulating membership reports, reviewing quarterly reports, processing honorary memberships, creating/renewing chapter-paid & sponsored memberships, and Chapter Circle of Excellence criteria. • Chapter leader event reports, improving member connections, use of membership and chapter administrative systems, and updating member profiles. <p>Pre-registration is required. More information to follow. Walk-ins will be accepted on a case-by-case basis if time allows.</p> |
| 10:15am- 10:55am | Chapter Best Practices <ul style="list-style-type: none"> • 10:15-10:35: Paving the Path Forward: Setting up your Chapter for Success, Christi Saenz, Immediate Past President & Southwest Regional Representative, Amy Esguerra, President & Erica Balderas, Treasurer, San Antonio Region Chapter • 10:35-10:55: Building a Strong Advisory Board, Mara Kirby, President & Mary Lou Kutska, Vice President, Greater Chicago Chapter |
| 11:15am-12:00pm | The Evolution of Our Brand |
| 12:00pm-12:15pm | Conclusion & Wrap-Up |

To take full advantage of this robust agenda, please arrange your travel to arrive on Tuesday afternoon and depart Thursday after 4:00pm PT.