



## ***Regional Chapter Onboarding***

*The Women in Pensions Network (WiPN) fosters targeted, strategic and dynamic alliances and networking opportunities for our local Regional Chapter members!*

### **3 Reasons to Start a Local WiPN Regional Chapter**

- Empowers women to elevate their game by creating career and industry connections that count.
- Provides opportunities for members and non-members to network, showcases their skills, and increases communication with women in the retirement industry as well as local members and sponsor partners.
- Drives increases in membership for the surrounding area and provides a vital professional resource for those women unable to travel to national industry events.

### **How to Launch a WiPN Regional Chapter in Your Area**

A local WiPN regional chapter provides an engaged and energized professional association for women to network and find comradery through shared experiences in order to optimize their individual resources and learn from other women in the retirement industry. Chapter events are designed to elevate professional soft skills through access to speakers, coaching and other career- enhancing experts.

You can launch a WiPN chapter if there isn't one currently available in your [region](#). Ideally, regional chapters are launched by current WiPN members within commuting distance to major metropolitan areas, or in geographic hubs for the retirement industry. It is recommended that a successful, growing chapter have two co-chairs who are jointly responsible for the growth and development of its membership. It is a good idea to have co-chairs from different aspects of the retirement plan industry-- for example, a TPA and a financial advisor. This is how a chapter begins to build its membership and gains momentum as a major voice for women in the retirement industry.

[WiPN's Regional Chapter Director](#) is a tremendous resource and support for co-chairs and for information on start-up chapter planning. [WiPN's Regional Chapter Director](#) will provide you

with the rules and expectations for chapter co-chairs as well as WiPN's Registered Agent documentation and Conflict of Interest policy to start the process. In addition, once you log in, there is a wealth of marketing information available for chapter co-chairs on the [Board/Co-Chair Resources page](#) in the upper navigation bar of the website.

Chapter co-chairs are encouraged to form an executive chapter committee from their core membership group. Committee members can help with strategic responsibilities for regional gatherings such as event planning, sponsorship, speaker topics and logistics, marketing and/or food/catering planning. By leveraging the talents of your chapter membership network a regional chapter can thrive and grow and meet the needs of their local members.

## WiPN Marketing Support

WiPN has two dedicated professionals available to help co-chairs be successful by supporting chapter-building efforts:

- **Gail D'Amico**, Marketing Manager  
If you have newsletter ideas or articles; marketing content; changes/additions to the website; or need help with LinkedIn posts, please contact [Gail](#).
- **Barbara Scarpa**, Administrative Assistant  
If you have questions related to MailChimp email campaigns, membership database, or EventBrite submissions and follow-up, please contact [Barbara](#).

## How to Set Up Your Regional Chapter Web Page

Please send your bio, contact information and LinkedIn headshot to [Barbara](#) to establish your chapter web page. This page will automatically include:

- Co-Chair names/contact information
- Visible to members-only: a list of members who are affiliated with the chapter (either because they chose to affiliate with the chapter, or have an address that was picked up as being close to the region's city or state)

You can further personalize your chapter page by providing a welcome message to energize your membership and encourage members to affiliate with your chapter. Women who joined WiPN previously can always change their chapter affiliation through their profile. And, if you already know about future events, we can post them on the chapter web page under Upcoming Events. Keep in mind that Event Submissions are automatically posted to your chapter page.

## Event Planning

Regional chapter co-chairs should begin by setting their yearly calendars to have an event each quarter. January is a perfect time to set the tone for the new year, welcome new members, and have a regional meeting with a featured guest speaker. Keep in mind that regional

chapters are expected to have a minimum of 2 events per year that are educational with a speaker or panelist as opposed to social, professional enhancement meetings.

For a new chapter, the goal is to have 10-20 attendees at the first event with increasing growth every year. For older chapters, there should be approximately 30-50 attendees at larger metro events and 15-20 attendees at smaller metro area events.

The co-chairs and their committee members can secure sponsors for the events. A typical sponsorship is \$500 and can be obtained from area wholesalers, TPAs, DC/Recordkeeping partners or firm sponsors. Events are usually held at a local sponsor's office or a restaurant with a private room. An event exceeding sponsorship fees needs prior approval from [WiPN's Regional Chapter Director](#).

## **Event Submissions**

Finalize the topic of your chapter event and submit it to the [WiPN's Regional Chapter Director](#) for approval. Sample topics include career advancement or professional development-- for example, you could bring in a professional coach or a panelist of senior women at sponsor firms. Topics not suitable for a WiPN regional event include the sponsoring firm's wholesaler discussion of their firm or products.

You should have your event details finalized no later than 45 days beforehand. Once you have finalized all the logistics for a given event, you can log into the [Board/Co-Chair Resources page](#) to fill out the event submission form (you must be logged in to access the form). Please be sure to include speaker bios and photos, as well as all sponsor names. If you don't see a sponsor on our [Sponsor page](#), assume we do not have their logo, and please provide one.

Please allow several days to see your event on the website which will include an EventBrite registration form. Marketing will also prepare invitations via MailChimp, which will go to anyone in the WiPN Contact list who is located in your state and/or metropolitan area.

The invitation is prepared using our WiPN branded template and reviewed by marketing. Specific requests about imagery, etc., cannot be accommodated. We will use our best judgment with the stock photography we have (or sometimes an image of the location), and you will be sent a test invite, which we ask you to respond to within 48 hours.

Unfortunately, we cannot send the invites to any distribution lists which you might have since people must legally opt into our contact list to receive email from us. If you would like to invite others in your area, it's best to forward the WiPN invite from your own email address.

## **EventBrite**

Co-chairs will also receive access to EventBrite via the WiPN account to manage their registration details. Please note that co-chairs must be logged into their WiPN EventBrite

account, as opposed to a personal account, in order to view WiPN events. Co-chairs can easily access attendee lists, print nametags and manage event check-ins on EventBrite on their own as follows:

- Find your chapter event, and click **Manage** which will opens your **Event Dashboard**, where you can choose **Manage Attendee**.
- Choose **Attendee List** to download a PDF of attendees.
- Choose **Manage Attendee** to scroll down to **Name tags** for your event. You can customize your nametags with business names by choosing First Name, Last Name and **Other** and filling in Company Name as a field.
- On the day of your event use your laptop, iPad or cell phone to go to **Manage Attendee** and scroll down to **Check-in** to confirm the attendance of your guests. **This confirms the attendee count at your event.** It is a good business practice to collect business cards of guests who may not have registered so the co-chair can follow-up.

### **Regional Chapter Events: Other Considerations**

- Consider if you are including a charitable component to the meeting. Charitable initiatives should be aligned with WiPN's overall mission related to helping women (or girls) succeed in the retirement or financial industry.
- Please note it is best to wait until you have all your information collected before submitting the event submission form; we are unable to accept incomplete information.
- Always have nametags and use the attendee sign-in feature in Eventbrite.
- For consistency, use the WiPN video and presentation to open the meeting. You can download the both the video and presentation from the [Regional Chapter Resources page](#) and select slides based on your audience and timing.
- Regional Events are typically 1.5 to 2 hours in length. Regional Chapter business meetings should follow this general format:
  - The event begins with 30 to 45 minutes of networking over appetizers before the formal business session begins.
  - The chapter co-chairs kick-off the meeting with an introduction of WiPN (remember this may be the first WiPN event for some attendees), an introduction of WiPN board members, an acknowledgement of sponsors, and an introduction of the speaker.
  - Speaker discusses the topic for 45 minutes to 1 hour followed by questions.
- **IMPORTANT: Sponsors may not present or hand out any sponsor product information at the events. This policy must be strictly adhered to in order to insure WiPN's 501(c)(6) non-profit organization status.**

## Event Follow-Up

- After each event, the co-chairs should provide pictures from the event along with a short write up including topic highlights to [Barbara](#) who will post the event information to the WiPN website.
- Chapter co-chairs can use their own LinkedIn to post pictures and event highlights. Be sure to include the chapter name, event name, and location. And tag any sponsors, speakers and special guests! Use hashtags #ConnectionsThatCount, #WomeninPensionsNetwork. Contact [Gail](#) to share your post on WiPN LinkedIn, or if your firm doesn't allow you to post on LinkedIn.
- Fill out the [Request Reimbursement form](#) for any expenses. You must be logged into the website to access the form.
- Marketing will send out a [Chapter Feedback Survey](#) to all attendees.
- Marketing automatically sends out 2 follow-up emails (one 2 days after, one 2 weeks after) to attendees who registered for the event but are not yet members.
- Co-chairs should send out Thank You emails to sponsors and include an attendee list. For your convenience, an Outlook Thank You template is available on the Regional Chapter Resource page.

*Launching a new WiPN Regional Chapter provides a valuable, supportive and inspiring platform for local women in the retirement industry!*