



WOMEN IN PUBLIC FINANCE

WOMEN IN PUBLIC FINANCE

CHAPTER RESOURCES CHEAT SHEET

Fill out this form and upload it to your chapter's document repository.

CHAPTER INFORMATION

Your Chapter's website address: https://www._____
(ex. www.chicagowpf.com)

Your Chapter's email address: info@ _____

Access: _____

Username: _____

Password: _____

To obtain your login credentials for your Chapter's email account, contact Laura at info@wpfc.com.

Your Chapter's mailing address: _____

DOCUMENT REPOSITORY

Use your Document Repository to store, manage, and view all important Chapter documents. The Document Repository link is posted on the footer of your Chapter's website.

Download the user guide here: https://content.app-sources.com/s/58152145515537902/uploads/WPF/WPF_Document_Repository-4061529.pdf

Access: <https://www.munidrive.com>

Username: _____

Password: _____

Date Store: _____

To obtain login credentials contact Dan Rodriguez at dan@designplanetstudio.com.

CHAPTER LOGO

An approved logo for your Chapter has been created. You will find several different file types for your use in the "Logos" folder of your Document Repository. Please see below for recommended usage for each type of logo file.

JPEG, PNG - Use for digital or online content such as emails, website, social media, and word docs.

EPS (aka vector) - Use for physical printing, promotional items and large scale banners.

ONLINE TRAINING AND CHAPTER RESOURCES

<https://www.wpfc.com/chapter-resources>

Use your WPF national membership credentials to login. You must be a paid WPF national member to access.

ACCESSING AND EDITING YOUR CHAPTER'S WEBSITE

Please note that you will need an admin account prior to logging in to your website portal.

Access: <https://wpfc.com/login> (link will be featured on the footer of your website)

Email: _____ (your Chapter's email address)

Password: _____

Use the Online Training and Chapter Resources web page to learn how to use the platform. If you're encountering problems with login, email Dan Rodriguez at dan@designplanetstudio.com.

EMAIL MARKETING

WPF is transitioning from using MailChimp's email marketing for email blasts to Design Planet Studio's built-in email marketing platform. Follow the steps below to transfer your email lists from MailChimp to Design Planet Studio.

If you don't have a MailChimp account, contact Dan Rodriguez at dan@designplanetstudio.com and he will let you know what steps to take.

MAILCHIMP

Access: <https://mailchimp.com/>

Username: _____

Password: _____

You will need to export your current email list from MailChimp into a .CSV file.

Instructions to do so can be found here: <https://mailchimp.com/help/view-export-contacts/>

Once you have your .CSV file, email Dan Rodriguez at dan@designplanetstudio.com for assistance in importing your list to Design Planet Studio.

DESIGN PLANET STUDIO EMAIL MARKETING

Login to your website using the same credentials to access your website. Once you're logged in, go to "Emails & Automations" on the top menu. If you are unfamiliar with using platform, watch the "WPF Website Training: Email Marketing on Design Planet Studio" in the Chapter Resources webpage.

Important Notice Regarding Email List Importation

Before importing your email list into the platform, we kindly request that you follow a crucial procedure to ensure compliance and data integrity. Please refrain from directly uploading email lists without first sending the list to Dan Rodriguez at dan@designplanetstudio.com. It is imperative that all email lists undergo processing through an email scrubbing service before being uploaded to the platform.

If you're encountering problems with login, email Dan Rodriguez at dan@designplanetstudio.com.

ZOOM MEETINGS AND WEBINARS

If you would like to use the National WPF Zoom account for meetings and webinars, contact info@wpfc.com or Sterling@mactexas.com. A fee of \$84 is charged by Zoom for webinars.

EVENT CREATION AND POSTING

There are two steps for events - creating and posting. For detailed information, watch the tutorial titled "WPF Website Training: Email Marketing on Design Planet Studio" in the Chapter Resources web page: <https://www.wpfc.com/chapter-resources>

Step 1. Create your Event with EventBrite

Access: <https://www.eventbrite.com>

Username: _____

Password: _____

Step 2. Post your Event to Membership Works

Membership Works shares your event information to the National website and all Chapter websites.

Note: you will need the URL that is generated from your EventBrite event before posting on Membership Works.

Access: <https://membershipworks.com>

Username: _____

Password: _____

To obtain your login credentials for your Chapter, contact Laura at info@wpfc.com

ADMINISTRATIVE AND LEGAL RESOURCES

Legal Support - Entity Structure

- Establishing a new chapter
 - Re-incorporating remaining chapters into Illinois
- Responsible Party: Chapter President

Documents and/or Required Filings

- Maintain chapter incorporation documents
- Ensure all new chapters are identified on the annual update letter (CPA sends to IRS)
- Coordinate with Chapters for annual incorporation report to Illinois
- Any other annual reporting requirements that may be needed for chapters registered as a foreign entity

Resource Materials Available/Affiliated Document(s)

- Chapter Bylaws
- Chapter Agreement
- Rider for Articles of Incorporation
- Consent to be included in Group Exemption Letter

For more information contact: Chapter President or info@wpfc.com

Insurance Requirements

- Ensure insurance is renewed/paid

Resource Materials Available/Affiliated Document(s)

- Directors and Officers Liability Insurance
- General Liability Insurance

For more information contact: Treasurer

Annual Financials

- Prepared by the Chapters President or Treasurer (Due July 31)

Resource Materials Available/Affiliated Document(s)

- Excel template

For more information contact: Treasurer