

Guide To Starting a Chapter of the Izaak Walton League of America

Three Steps To Form a Chapter

So you're interested in organizing a chapter of the Izaak Walton League of America? Thank you – and welcome to the League!

With an approved charter, a new chapter becomes part of almost a century of national prestige and conservation traditions that form the colorful history of the Izaak Walton League of America (IWLA).

Forming a new League chapter is an exciting but challenging undertaking. Success requires vision, time, and commitment. You need to have a clear idea of what your new chapter will do, how it will be organized to accomplish its goals, and at least 10 volunteers ready to take on this challenge.

The *IWLA Chapter Manual* is an excellent resource that contains much of the information you'll need to organize and maintain a successful chapter. The manual provides information to help you structure, manage, and fund your chapter's conservation projects and outdoor activities. References to the *IWLA Chapter Manual* are found throughout this guide to starting a League chapter. Please contact the League headquarters at chapters@iwla.org to request a copy of the manual.

The following is a detailed three-step guide that will take you through the preliminary stages of organizing a chapter to becoming a full-fledged Izaak Walton League chapter.

Step 1: Organize a New Chapter

Seek At Least 10 New Members for Your Chapter

Invite Interested Friends and Acquaintances – Now that you have determined that an Izaak Walton League chapter would be a great asset to your community, ask interested friends and acquaintances through a telephone call, letter, e-mail, or personal contact to meet with you for an informal discussion.

Make a special effort to invite people you know are concerned about local conservation and environmental issues in which your chapter might get engaged. It's also a good idea to invite a few key civic-minded people, businessmen, and professional leaders who have outdoor interests – such as hunting and fishing – and are concerned about environmental issues. Such “action” people can add impetus and drive to your organizational efforts.

You may find that more than one preliminary meeting might be necessary, but your objective should be to form the basis of a chapter at the very first organizational meeting.

Host an Organizational Meeting To Form a Local Chapter

When at least 10 prospective members have informally agreed to form a chapter and identify a series of goals or projects to undertake, hold a formal organizational meeting with them. Here are some ingredients for holding a successful meeting:

Set a Date – Once a group has agreed to form a chapter (at least 10 are required to file a petition for charter), set a date for the official organizational meeting. Take into consideration work schedules and family commitments potential members may have. But when you set the date and time, stick to it! If prospective members think that the meeting can be changed for their convenience, you may never find a suitable date.

Arrange for a Speaker and League Literature – A knowledgeable member of the League, such as a member of the sponsoring chapter (if applicable), a representative from the state division (if there is one), or an IWLA Regional Governor, should be present at the meeting to discuss the value of membership in the League and to answer questions.

The League's national office can supply League literature (e.g., brochures, fact sheets, magazines) for prospective members to take home. Please order literature and extra membership applications at least three weeks before your meeting date.

Invite All Prospective Members – Invite all interested people in the community. Let invitees know that they will not be responsible for arrangements or running the meeting – they are only asked to attend. Successful organizational meetings do not have to be large. Sometimes smaller meetings for organizing and electing temporary officers, with an attendance of 15 to 20 interested key people, may be more effective in getting things done.

Prepare a Meeting Program – One sure-fire ingredient for conducting an interesting chapter organizational meeting is a well-planned program describing the Izaak Walton League at the local, state, and national levels. Develop a detailed meeting agenda and have enough printed copies on-hand for those who attend.

The chapter founder or another prospective new member who is familiar with League history and goals should be selected to introduce sponsoring or invited state and chapter League representatives who are in attendance as well as any local community leaders who are there.

A Word from the League – If a state division representative is present, he or she should present highlights and major accomplishments from League history and explain the relationships among the League's national office, the state division (if applicable), and the local chapter. In addition, he or she should present a short description of the division with an outline of past accomplishments, some current activities and goals, and opportunities for the new chapter to be active on the state level. The division representative should also pledge the support and assistance of the state division.

NOTE: Consider showing the brief IWLA video that highlights the League's mission, accomplishments, and organizational structure.

If there is a sponsoring chapter, the president or other official from that chapter can talk about the need for the new chapter to engage the community; describe successful projects, current programs, and future goals of existing chapters in the state; and suggest activities that the new chapter might undertake. The sponsoring chapter representative should also pledge support and assistance as the new chapter gets underway.

League representatives should be brief – no longer than five to seven minutes each. (Don't wear out your prospective members!)

Discuss the New Chapter's Objectives – The new chapter founder or chairperson should also present some suggested goals or projects for the new chapter. The prospective members can then discuss possible conservation projects or environmental problems to address in the area. You may find it handy to have a flipchart on which to write down suggestions, but it's best to pick one issue and see it through to completion.

Prepare and Submit Required Chartering Paperwork

Name the Chapter – After the group formally agrees to organize as a chapter, the founder and/or others in attendance should suggest a name for the new chapter. The group should vote on adopting a name.

Elect Temporary Officers – Pre-select a moderator to open the meeting for nominations for temporary officers: president, vice president, treasurer, and secretary. (The secretary and treasurer offices may initially be held by one person.) You may want to conduct the vote by secret ballot, but this is not usually necessary. After your election, document these officers on an Officer Report Form found in Appendix A in the *IWLA Chapter Manual*.

Set the Chapter Dues – The annual rate of dues *must* include national dues to the Izaak Walton League of America plus local chapter and, if applicable, state division dues. Before the organizational meeting, refer to the enclosed IWLA National/State Division Dues Rates Chart found in the “IWLA Chapter Starter Kit” Chapter Membership Packet for current national and state dues rates or contact the IWLA Membership Department by calling toll free (800) IKE-LINE (453-5463) at either extension 208 or 213 or by e-mailing members@iwla.org. Determine what amount your chapter would like to collect in addition to the national and state dues and set a final amount that each member must pay annually. Consider family, student and youth memberships too.

Complete Membership Applications and Collect Dues – IWLA membership applications should be filled out by all new chapter members and dues paid to the treasurer. Be sure to collect the dues at this first organizational meeting; if you put this off, you may lose members.

After the meeting, the treasurer should fill out two membership forms: a Tally Sheet and the New Member Report Form. If using the hard copies of these forms found in the “IWLA Chapter Starter Kit” Chapter Membership Packet, keep the pink copy for the chapter and send the white and yellow copies along with one payment to the national office (the address is provided on each form). If you use the electronic files for each form (found online www.iwla.org/chapters; navigate to “Chapter Tools” and then under “Reports and Forms”), print out and send two copies of each sheet to the national office.

Complete the Petition for Chapter Charter – The petition for the chapter charter (found on the “IWLA Chapter Start Up” CD-ROM) must be completed and three copies made. On the petition for charter, explain in your own words how your chapter will benefit the community. Send the original and one copy to the IWLA national office and send one copy to the state division (if applicable). Keep one copy for the newly-formed chapter's files.

Adopt Articles of Incorporation and Bylaws – Draft Articles of Incorporation and Bylaws for the new chapter. Samples or models of these documents are included in the “IWLA Chapter Start Up” CD-ROM. Complete these forms at your organizational meeting or soon after and make three copies. Send the original to the national office and one copy to the state division (if one exists), and keep a copy for the chapter's files.

Mail Forms – Send the IWLA national office (attention of the IWLA Membership Department):

- The original and one copy of the Petition for Chapter Charter
- One copy of the chapter’s proposed Articles of Incorporation and Bylaws
- Payment of national and state division dues (if applicable) with one check/money order
- White and yellow copies of the Tally Sheet and the New Member Report Form (if using the hard copy form) or two printed copies of each form (if using the electronic file)
- Officer Report Form with complete listing of your chapter’s temporary officers listed

Send the state division president (if your state has a division):

- One copy of the Petition for Chapter Charter
- One copy of the chapter’s proposed Articles of Incorporation and Bylaws

The new chapter should retain:

- One copy of the Petition for Chapter Charter
- One copy of the chapter’s proposed Articles of Incorporation and Bylaws
- The pink copies of the Tally Sheet and the New Member Report Form or a photocopy of the completed electronic form
- The chapter’s local portion of the membership dues

Form Committees – Because a large part of chapter work depends on committees and committee chairs, the first organizational meeting is also a good time to appoint temporary chairpersons for chapter committees. Conservation, education, membership, public relations, and finance are the basic standing committees you can start with. The most important thing is to give everyone a job to do.

Plan for Future Meetings – Decide how often the chapter will meet, using the same time and place for each meeting. Set a date for the next meeting, at which time the members should elect permanent committee chairs.

NOTE: Refer to the *IWLA Chapter Manual* (Unit I, “League Leadership”) for details on chapter officers, board members, and committee structures.

Step 2: Apply for a Charter

IWLA Executive Board Review

Upon Receipt – IWLA national office staff will perform a preliminary review of your submitted paperwork, then forward it to the members of the IWLA Executive Board. The paperwork to be sent to the Executive Board includes:

- Petition for Chapter Charter
- Chapter’s proposed Articles of Incorporation and Bylaws
- Copies of the Tally Sheet and New Member Report Form
- Officer Report Form

Final Process – The IWLA Executive Board formally reviews and approves petitions for charter at least twice a year – once in July at the national convention and again in January or February during the mid-winter Board of Directors meeting. It is at one of these meetings that a chapter’s charter process is completed as part of the League’s official business.

As part of their review, the IWLA Executive Board may request changes to a new chapter's submitted draft Articles of Incorporation and Bylaws. Please be prepared to make modifications based on possible recommendations from the Executive Board.

Official Confirmation and Chapter Charter Certificate

Confirmation – After approval, a letter signed by the IWLA National President confirming your charter and an official charter document (certificate) signed by IWLA national officers will be sent to the new chapter's leadership.

Organize a Charter Meeting – Charter signing night is usually a dinner or banquet affair attended by new chapter members and their spouses and members of the sponsoring chapter. The charter may be presented in a formal ceremony by the state division president or other division official, president of the sponsoring chapter, or a League official such as a national officer, the regional governor, a national director, or the executive director. If possible, try to have 25 members or more by charter signing night.

When setting the date for charter signing night, allow at least four to six weeks after the Executive Board's approval to receive the official charter document from the IWLA national office. In addition, you will receive a letter welcoming your new chapter to the League as well as membership cards, decals, and a list of supplies available from the national office. The names and addresses of chapter members will be placed on membership rolls at the national office and on the mailing list for the League's quarterly magazine, *Outdoor America*.

Charter Member Recruitment – Initially (unless a membership chair has already been selected), the chapter secretary will receive the membership materials from the national office. In time, your chapter should designate a chapter membership officer, often referred to as the membership dues recipient (MDR). Keep charter membership open until the charter night – or even later – to encourage more charter members. (Charter membership has a special meaning and you may get more members that way.)

Step 3: Fulfill Chapter Requirements

Begin To Function as a League Chapter

After your chapter charter is approved, your new chapter can begin to function as an official chapter of the Izaak Walton League and fulfill your local conservation objectives in support of the League's mission.

Chapter Resources – The *IWLA Chapter Manual*, found on the "IWLA Chapter Start Up" CD-ROM, contains much of the information you'll need to organize and maintain a successful League chapter. As a guide, this manual provides you with the basic information about the Izaak Walton League of America and its network of local chapters. This manual is divided into six units and emphasizes important points proven to be valuable in operating a local chapter of the League.

The manual provides information on governance, financial management, legal issues, and fundraising strategies. It also includes ideas on membership recruitment, conservation projects, outdoor activities, and public relations to help you manage your chapter.

Every chapter officer should study this material carefully. In addition, please be sure to share it with committee chairs and key volunteers. The CD-ROM format provides an easy way for you to print and share sections of this manual with other officers and volunteers.

NOTE: Refer to the *IWLA Chapter Manual* (Unit I, “League Leadership”) for tips about what makes a successful chapter.

Fulfill Your Local Conservation Objectives and Support the League’s Mission

Conservation – IWLA chapter members actively promote the League’s conservation mission through on-the-ground projects such as picking up litter or restoring stream banks, by teaching members of the community about hunter safety and responsible outdoor behavior, and by making their voices heard from city hall all the way to the halls of Congress.

Unit IV of the *IWLA Chapter Manual*, “Conservation Programs and Projects,” describes the League’s core conservation programs and provides a how-to conservation projects section. Each two-page project description is based on an actual project successfully conducted by League chapters that has helped to advance our conservation mission. We hope these programs and activities will inspire your chapter to conserve and protect our natural resources.

Outdoor Recreation – The League’s mission states that League members should “promote means and opportunities for the education of the public with respect to such resources and the enjoyment and wholesome utilization thereof.” Our founders knew that people who enjoyed outdoor recreation would be more likely to take up the cause of conservation. Today, our chapters continue that tradition by providing people with a variety of ways to enjoy the outdoors.

Unit V of the *IWLA Chapter Manual*, “Outdoor Recreation and Activities,” offers ideas and management guidance for outdoor recreation activities. At the end of this unit, there is a how-to outdoor activities section. Each two-page description presents an actual outdoor activity successfully conducted by League chapters that advances our dual mission of conservation and outdoor recreation.

Prepare To Fulfill Additional League Obligations and Legal Requirements

In addition to the initial chartering activities, you will need to take steps to comply with other provisions of the League’s Bylaws as well as federal, state, and local laws.

Incorporation – Although the petition for charter must be accompanied by proposed articles of incorporation and bylaws, it is up to the chapter, upon approval of the draft documents, to submit the required paperwork to form a corporation (called a certificate of incorporation) and pay the requisite fee. In addition, many state governments require corporations to file regular reports to maintain their corporate status.

If the chapter does not incorporate, its directors and officers could be held personally liable for claims not covered by insurance or the organization’s assets. By incorporating, officers and directors receive greater protection against legal claims made against the corporation. Because incorporation can be a complex process, you may need the assistance of an attorney familiar with the requirements of your state to help you through it.

Employer Identification Number – One of the first things a new chapter should do after incorporation is apply to the U.S. Internal Revenue Service (IRS) for an Employer Identification Number (EIN). An EIN allows your chapter to open bank accounts and conduct other business on behalf of your newly established chapter. (Your chapter should open a checking account to facilitate handling dues and other expenses.) The form to obtain an EIN (IRS Form SS-4) is available at your local IRS office or online at www.irs.gov.

IRS Requirements – All League chapters must file some version of the IRS Form 990, a federal tax return for nonprofit organizations. The gross revenues of the chapter or state division in a given year determine which form you must use: 990, 990-EZ, or 990-N. In addition, chapters and state divisions must also comply with state and local tax laws.

Tax-Exempt Status – Each new local chapter does not automatically receive the League's 501(c)(3) group exemption status determination by the Internal Revenue Service (IRS). Your chapter may opt to seek non-profit tax-exempt group coverage by submitting a Chapter 501(c)(3) Group Coverage Form.

To be covered under the IWLA group exemption, a chapter must fill out a detailed form to help the League determine whether the chapter's activities are consistent with the national organization's mission and meet the minimum thresholds for qualifying as a tax-exempt organization under the League's group exemption. The deadline to submit this request form is June 1st of each year. Each fall, the national office is required to submit to the IRS an updated list of chapters and state divisions that qualify under our group tax-exempt status, so this information must be updated annually. This IWLA group exemption request form is available by contacting the League's National Office – Director of Administration and Meetings by calling toll free at (800) IKE-LINE (453-5463), extension 222, or via email at chapters@iwla.org.

Other Obligations and Requirements – As members of the national organization, members of your chapter can take advantage of many benefits and opportunities. These include opportunities for chapter delegates to participate in the League's annual national convention, elect the League's national directors and officers, and help shape the League's conservation policies.

As a member of the national organization, your chapter members also receive copies of the League's print and electronic publications, including our quarterly magazine, *Outdoor America*, and monthly "Conservation Currents" electronic newsletter. You can also take advantage of a wealth of knowledge and technical assistance from volunteers and staff on everything from membership recruitment to communications, governance, and conservation programs and activities.

In addition, League chapters have ongoing duties and responsibilities under the League's National Bylaws. For example, chapters are required to collect annual dues and send the national and state portions to the national office in a timely manner. Each chapter is also required to routinely provide copies of certain documents to the national office. A copy of the most recent version of the League's Bylaws, laying out these duties and responsibilities, can be found in our annual *IWLA National Directory*.

As a separate and independent organization, your chapter is also responsible for its own affairs and can be sued and held accountable for its actions. Your chapter needs to ensure that it complies with all applicable federal, state, and local laws. It should also take adequate steps to

help avoid future liability for any claims that might arise. Unit II of the *IWLA Chapter Manual* focuses on the steps your chapter can and should take to help ensure that it is well managed – financially and legally.

Best wishes to you and your chapter members on this exciting and challenging undertaking to form a new chapter of the Izaak Walton League of America. We welcome you as defenders of America’s natural resources – our soil, air, woods, waters, and wildlife.

For more information or assistance in forming a new chapter, please contact:

**Izaak Walton League of America
Chapter Relations Department
707 Conservation Lane
Gaithersburg, MD 20878-2983**

**(800) IKE-LINE, Extension 236
E-mail: chapters@iwla.org**



www.iwla.org/chapters