



WORLD  
AFFAIRS  
COUNCILS of  
AMERICA

**OPERATIONS PAPER**

**STARTING A COUNCIL**

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## Starting a Council

Starting a new Council is a task that requires determination from a committed team of leaders. All of the Councils in our system have formed through individual efforts and are proof that perseverance pays off. This operations paper walks you through the process of starting a new Council and provides resources for support and assistance.

### Benefits

World Affairs Councils are very beneficial to individuals and to a community by bringing together like-minded, internationally oriented people to keep up with and be a part of world affairs in a very engaging and non-partisan way. Councils help the community through outreach to individuals, media, schools, universities, businesses, and other organizations.

Councils are excellent complements to informational resources (newspapers and television) as they expose people to different interpretations of world events and give them a chance to discuss and question international leaders, journalists, politicians, and intellectual figures in the field. Councils are an excellent blend of intellectual and social activity emphasizing meeting people, learning, doing things together, supporting good causes, and having fun.

### Initial Steps in Starting a Council

Councils are started largely through local effort, with advice and consultation from the national office in Washington and help from other Councils.

Generally speaking, it takes a small handful of committed people, normally in the range of 2-5, to get a Council off the ground. Experience shows that it is extremely difficult for a single individual to start a Council and keep it running. These 2-5 people need to be dedicated to the project. A prestigious person or two lending their names but not actively participating can be very helpful, but there is no substitute for the hours that need to be contributed.

Once a core group is formed, the basic tasks include:

1. Contacting the national office and other Councils for advice
2. Reviewing all WACA operations papers
3. Forming an initial plan for:
  - The developmental path that the organization should follow
  - Naming the organization
  - Formulating bylaws
  - Incorporating as an organization
  - Forming a board
  - Getting non-profit status nationally and locally
  - Deciding on initial programming activities
  - Formulating a fundraising strategy
  - Creating a plan for building membership
  - Developing a budget

As soon as it is possible, it would be wise to print a brochure or hand-out on the new Council, print business cards and stationery, get a web domain name, an email address, and get a Council bank account. Most new Councils have been able to do all this at little or no cost by drawing on member desktop publishing skills or get a friendly organization to do the work pro bono.

### **Help from the World Affairs Councils of America**

The national office in Washington, DC, the national board, and the various Councils in the system can be invaluable in terms of information. Each of the nearly 100 Councils in the system started up independently. Combined with a number of failed start-ups, there is an accrued body of “lessons learned” that can be very helpful. While there are no silver bullets that always work, there are things to be avoided that can lead more often to failure than success.

The national office helps at the outset by advising, in discussion with you, which of the many models or pathways of start-up (described below) look the most promising. This is best done by visiting the national office, as consultations tend to be longer and more detailed that way. If a visit is not possible, a series of phone consultations will also work.

The national office will send you documents describing in detail the system as a whole, explaining the national services available to a new Council.

The national office also can put you in touch with other members of the Council system, who can be especially helpful on fundraising, membership, opening an office, or any other assistance

In all cases, it is very useful to look at the national web site and the websites of a number of Councils to see how others handle various aspects including speaker and other programs, membership levels and fees, publicity, structure, etc. Look first at the smaller Councils sites which can be the most help with your startup.

### **Alternative Start-up Pathways**

There are numerous alternative pathways for starting a Council. Crucial at the outset is the strategic decision of which road to go down. The main alternatives are:

- Starting a free-standing organization unconnected to any other organization
- Starting a Council that is a part of a university
- Starting a Council that is supported but not controlled by a university
- Starting a Council with the assistance of a chamber of commerce, a world trade center, a council of international visitors, a foundation, a company, or a philanthropist
- Getting an already existing group to expand to become a Council

Most Councils in the country are free-standing 501(c)(3) non-profits. Assuming that no other organization is assisting in the start-up, which is normally the case, this is the hardest of the alternatives but the most stable over time. The hard parts are getting some initial funds together to work with, though Councils have been started with as little as \$500, and getting enough people to join an organization without reputation or a track record.

Starting with the assistance of other organizations may raise control issues. In general terms, World Affairs Councils controlled by other organizations have not worked well. However, if the control issue can be sidestepped, collaborative ventures can be very valuable in terms of facilities, staffing, initial funding, resources, and technology. Before joining ventures with another organization, it is important to establish the Council’s independent identity, so that it is not seen primarily as an organization that exists to further the mission of the assisting organization.

Generally speaking, the problems of conversion and expansion have been easy to solve. Some or all of the infrastructure for a functioning World Affairs Council is already in existence and does not have to

be created. Generating the new identity however does require a plan and real effort. That is usually best started with new programmatic activity establishing the new identity.

### **Name**

When selecting a name for a new World Affairs Council or applying for your 501(c)(3) status it is important to adhere to the following policies in order to be admitted into the World Affairs Councils of America network.

1. You may not select a regional or statewide name if there are existing Councils within the State or region
2. If you choose a statewide name the following applies
  - a. In the event a new Council is formed in the state you must
    - i. Add your physical location on all stationary, advertising, etc. Example: ‘The World Affairs Council of Montana’ – if a new Council is formed in Kalispell, the existing Montana Council would be required to reference itself from the time the new Council is incorporated or accepted into the World Affairs Councils of America network as ‘The World Affairs Council of Montana, Missoula’. The new Council in Kalispell could become a variation of the “World Affairs Council in Kalispell”.
    - ii. You would not be allowed to raise funds within an agreed upon radius of the new Council
    - iii. you would not be allowed to use the statewide name on television or radio broadcasts without adding the location on your byline
3. Once your organization becomes a member of the World Affairs Councils of America a line should be added to stationary and written correspondence “member of the World Affairs Councils of America” and if possible include the logo. (Upon acceptance into the World Affairs Councils of America you will receive a standards manual and a CD of artwork to enable you to use the WACA logo.)

The practices detailed above do not affect existing Councils where there is already a regional or state wide overlap. In the case of these councils, the WACA will mediate any disputes regarding the soliciting of funds or members.

### **Membership**

World Affairs Councils are open membership organizations, i.e. open to all who wish to join. Sizes vary from 50 members to 10,000.

In general terms, it is hard for a Council to succeed longer term with less than 100 members. Since all members do not turn out when there are programs, too few members means audiences too small for programs to be viable. Less than 100 members also suggests an organization that is not well supported and may for that reason generate problems with potential donors, companies, and foundations.

It is desirable to get your programs going early, even before you reach the goal of 100 members. Waiting too long before getting rolling is worse than starting too early. Target to begin a speaker program within 6-9 months of incorporation. Setting a goal of 100 members at the end of year one is a reasonable starting point. Reevaluate your goal once this number is reached.

## **Program Options**

Each local Council starts and runs programs of its own choosing. There is no formal requirement that a Council put on any particular type of program, however, a speaker program is common to all Councils and likely the foundation for all your programs.

The program areas of all Councils collectively are as follows:

### Major programs

- Speakers
- School programs, including Academic WorldQuest
- WorldQuest for adults
- Great Decisions
- Corporate programs
- Young professionals programs
- International Exchanges
- Conferences

### Supporting Programs

- Newspaper & internet columns
- Radio or television programs
- Travel programs
- Publications
- Social events
- Opinion polling
- Policy task forces.

The speaker program is usually the place new Council's start since it is easier to start than others, is more visible, and attracts a broader audience. It is possible to start with one program area while simultaneously announcing that the Council plans to expand into other sectors as it develops. The majority of Councils run programs in 2-5 sectors rather than just one.

Diversity of programs is an advantage over the long run, conferring greater membership and donor appeal and giving the Council greater comparative advantage locally.

## **Promotion and Advertising**

You can begin to develop a membership base by advertising in local papers and periodicals of the formation and upcoming programs. Most papers have a local calendar of events which you can submit for inclusion free of charge. Paying for advertising, especially at the early stages, is not necessary. Ultimately, your best source of new members is promotion from existing members.

## **Develop Initial Strategic Plan and Actions for Year 1**

- Establish and document your strategies and plans for the first year (and beyond) covering key areas of start-up, programs, membership, promotion, and funding. An example of a recent Council strategic plan is available from WACA.

## **Articles of Incorporation**

Incorporating is done through each individual state. Advice and sometimes even document preparation can be done *pro bono* through a friendly lawyer, a corporate adviser, or by yourself using advice from the internet, the state filing office, and other councils in the state.

Incorporation is a valuable statement of seriousness about the organization, in limiting liability for the founders, in making donors feel secure, and in getting 501(c)(3) status from IRS. Costs vary by state, generally in a range between \$35-\$300.

### **Getting 501(c)(3) Status**

Almost all of the Councils have 501(c)(3) status from IRS. This gives you non-profit, tax-exempt status and an EIN number.

Generally speaking, the IRS takes 3-6 months to grant 501(c)(3) status. Your approval letter from IRS will usually grant tax-exempt status from the date of the formation of the organization rather than the date of the letter, which can be helpful with initial fundraising.

To the best of anyone's knowledge, IRS has never denied a well-prepared World Affairs Council application. It has asked for further information or for clarification however.

For the most up to date information on filing with the IRS use the website:  
<http://www.irs.gov/charities/index.html>

### **State Tax-Exempt Status**

Councils are advised to apply for state tax-exempt status after they have sent in their IRS application. Generally speaking, you do not have to wait until the IRS has made its determination to apply at the state level.

### **Forming a Board**

Having a local board is a requirement for 501(c)(3) status. It is also standard operating practice in the non-profit world. You cannot expect to get donations or grants without a board.

Boards have two main functions in the non-profit world:

- Policy-making
- Fundraising

The fundraising function is inescapable because, as a non-profit, the organization cannot, as companies do, sell goods and services to the market. The money has to come in through different means. How? The board brings it in through its actions, decisions, and connections.

There are essentially **three types of Councils** in the **World Affairs Council system**:

- A) All-volunteer Councils where there are no paid staff and where the board and other members complete all tasks.
- B) Intermediate Councils that combine some characteristics of Type A and Type C. In these, there are a small number of paid staff members and some board members supplement the staff. The board serves the council in a dual role.
- C) Council with prestige boards and a paid staff of 5-30. The Council has name recognition in the community. Board membership is about prestige for individuals and the Council and the emphasis is on major fundraising. These boards are usually associated with large Councils.

A start-up board of Type A needs to fulfill several functions simultaneously: (a) incorporation, (b) forming the strategic plan for the new organization, (c) preparing and implementing the programs of the

council, (d) generating membership, (e) building relations in the community, (f) generating publicity, and (g) raising funds for the organization by either giving or getting.

In general terms it is better to move slowly in filling out the board. It is also better to focus on potential candidates as individuals rather than as representatives of organization X. The two key questions at the outset are: a) is this person genuinely interested in the work that world affairs councils do, and b) what will the person bring to the council (i.e. money, members, contacts, speakers, labor hours, administrative help) once they are a board member?

Board training can be useful for start up boards. Many board members enjoy the prestige of serving or being a decision maker for a Council. However, for a Council to be healthy, it is important that every board member understands his or her fiduciary responsibility.

Beware of board members who look at board seats as nice sinecures to give themselves a resume-filling or rhetorical role in the community. Also beware of the easy trap that new Councils and new board members fall into, namely defining the role as “going to board meetings.” The essence of the matter is what they can deliver for the new organization, in effect meaning what they can make happen between board meetings.

Setting the expectations for “active” board membership at the outset is very important. It is also important to be able to move people off the board quickly when it is clear that they aren’t assisting with growth and development. Establish a Board Role and Responsibility Statement which outlines expectations and commitments.

One way to avoid weak board membership is by instituting a probationary period for six months or a year and making expectations clear.

### **Creating By-laws**

The national office can supply you with sample by-laws for start-up purposes. It is best to view the by-laws as a general, broad framework and not to be too detailed and specific. You can establish policies to fit within a set of by-laws. By-laws can be amended along the way. Make sure your by-laws allow the board to do the amending; otherwise it is too cumbersome and slow.

It is best to start with basic by-laws and move on quickly to programs, fundraising, membership, and establishing a reputation, which are much more important to you at the outset. A more detailed strategic plan can outline the specifics of the by-laws policies and provides specific details for action in the near future.

The World Affairs Council of San Antonio has an effective board structure, and you can view their by-laws by visiting this link. <http://www.wacofsa.org/mission/>

### **Initial Fundraising**

Getting money at the outset is difficult. Various Councils have managed this by:

- Getting a major contribution from one person, often the founder
- Getting a company, chamber, or university to make a start-up donation
- Holding a big-splash fundraiser as an opening Council event
- Asking new members to make a high one-time contribution to help start the group
- Concentrating hard on building membership fast at the outset

- Asking a well-known community figure to spearhead a start-up fundraising drive
- Asking a marquee figure to be kick-off person who opens the Council program
- Getting a start-up grant from a foundation

Fortunately, you do not have to aim at large amounts. Several Councils have started with hundreds in the bank. An initial goal of \$5,000 is a good target. Small Councils can run on as little as \$5,000 if they seek out free services and start with a basic speakers program only. Budgets for Councils in the 50-200 member range and only a speakers program have tended to be \$5,000 - \$20,000 annually.

### **Joining the Council System**

Once most of the initial start-up steps have been taken, it would be wise to apply for membership in the World Affairs Council system. The system confers prestige on a fledgling organization and can offer many helpful services. A Council does not have to be fully operational to apply.

To apply, you will need to fill out a form provided by the national office. You will also need to attach a letter stating that the new organization is a non-profit, non-partisan, not part of any government, and based on open membership and a list of board members with contact information.

Send the application to the national office for board committee approval. As soon as a Council is approved, it is entered into the National Membership Directory at the national office and also put into the national website.

After approval, the start-up Council will be invoiced dues of \$500 from the national office. The regular dues system has a floor of \$500 and a ceiling of \$3,750. Councils pay once annually on a sliding scale based on their membership.

To help developments at the local level, the national office will issue press releases to all of the important local media and organizations that the Council nominates. A list of local media contacts should be presented to the World Affairs Councils of America office.

It is also valuable to the new Council to send one or more people to the national conference held each year in Washington, DC. This is the only time the entire network comes together and it is an excellent opportunity to network, discuss problems, and learn from the rest of the system. There is a pre-conference staff and board workshop that provides for the sharing of best practices.

### **Things to Watch Out For**

- One person efforts. Starting a Council is a collaborative process.
- Initial fundraising is discouraging. If the cost-benefit ratio of hours worked to money coming in is too low--people will give up.
- Discouragement because membership fails to meet initial quotas. It is important to know where to look for members and advertise programs. As the Council establishes itself, people will be attracted to the organization.

### **National Services for Councils**

One thing that can help you quickly is drawing on the services that are available to you through the national office. These are available in part before your Council is accepted officially as a member. They are available in full measure after acceptance.

The national services essentially provide access to the:

- Leadership Network (an online platform for Council leaders)

- National speaker referral services (book, monthly emails, and national files)
- National conference
- National Subscription discounts on foreign policy publications and books
- Travel programs of the Council system
- Operations papers
- Operations workshops at the national conference
- Leadership Missions abroad
- National program series
- Telephone consultations by the national staff
- Local board workshops
- National newsletter
- School program publications
- National Academic WorldQuest competition

You should make sure you get a briefing on these services early on so you know what is available. You can get the detailed briefing at the national office or over the phone from the national staff.

Your Council is also welcome to join the travel consortium of Councils, which has the effect of opening the travel programs of the World Affairs Councils of America Flagship program *Travel the World* operated by the Philadelphia Council to all your members immediately. This gives your members an immediate benefit for their membership as well as an opportunity for some funds to go to your Council.