

WPCNA WORKSHOP
MARCH 11, 2025
WHITE PLAINS BOARD OF EDUCATION
5 HOMESIDE LANE

FEATURED GUEST SPEAKERS:

Common Council Members: Jenn Puja , Jeremiah Frei-Pearson, and Justin Brasch

**JOIN OR CREATE YOUR LOCAL NEIGHBORHOOD
ASSOCIATION AND HAVE A VOICE AS
WHITE PLAINS GROWS & EVOLVES**



Workshop Agenda:

- **Mission of WPCNA and Partnerships with the City**
- **Partnerships with the City Officials**
- **Adopting by-laws**
- **Selecting directors and officers**
- **Attracting volunteers**
- **Dues and budgeting**
- **LLC vs Non-Profit vs Small Business**
- **Creating and publicizing events**
- **Scheduling meetings**

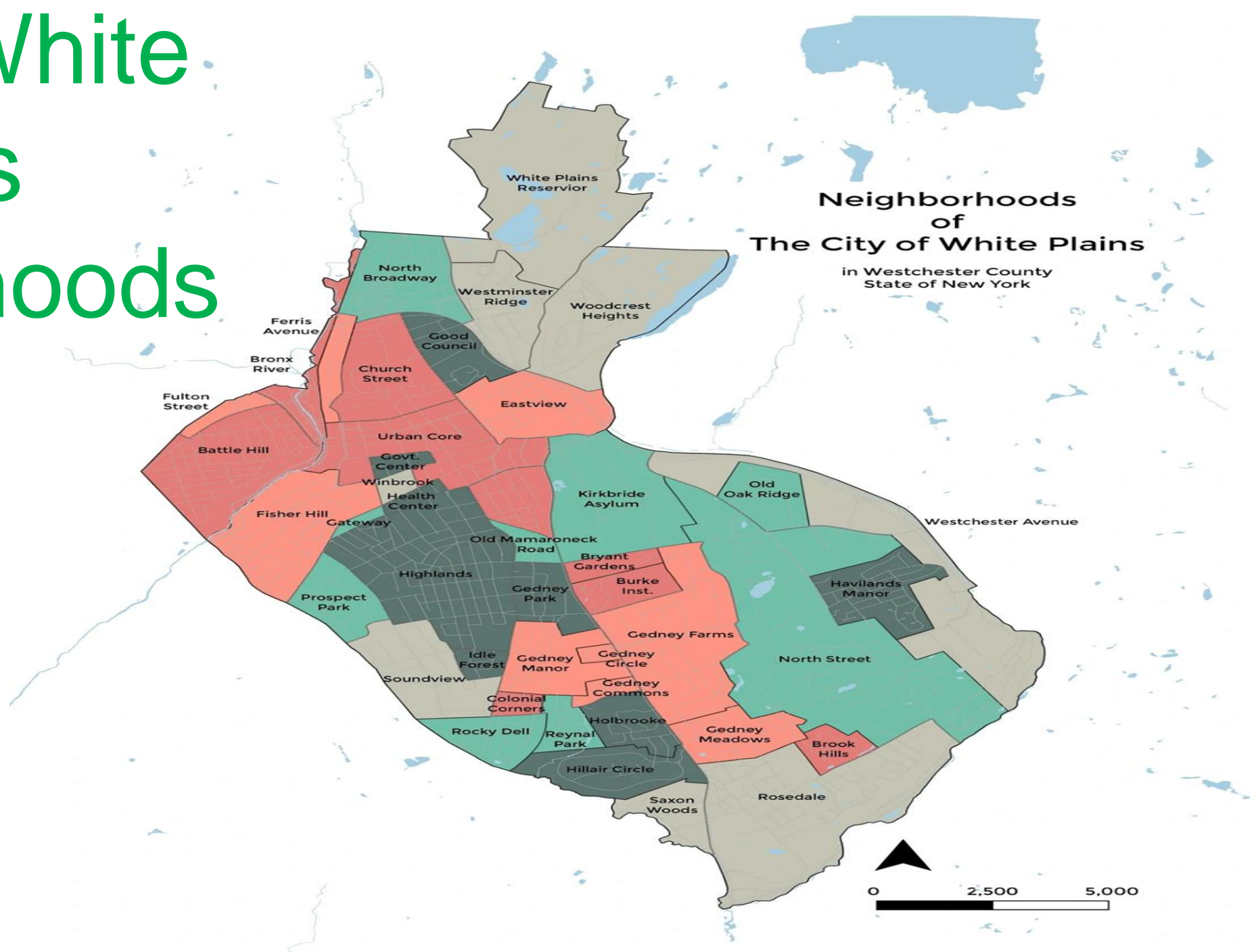
Mission of WPCNA and Partnerships with the City

The Voice of the Neighborhoods

- **White Plains Council of Neighborhood Associations (WPCNA or CNA)** is a forum for neighborhood associations of the great city of White Plains NY to Share & Exchange Ideas
- **Monthly Meetings:** The WPCNA conducts meetings on a monthly or bimonthly basis, typically on the second Tuesday of each month at 7:00 pm. Meetings are in person at the White Plains Board of Education or via Zoom.
- **Tradition & History:** White Plains is a city of neighborhoods with rich history & tradition. Many of these neighborhoods have active associations who are members of WPCNA.



Historic White Plains Neighborhoods



Mission of WPCNA and Partnerships with the City

The Voice of the Neighborhoods

- **Building Community:** The WPCNA welcomes and invites all communities and residents to stay connected to the city we love through our many activities.
- **Connected to the City:** The WPCNA prides itself on maintaining a positive and open relationship with both elected officials and the many operating departments throughout the city.



Partnerships with the City Officials

Common Council Members:

- Jenn Puja (Running for District 5 County Legislator)
- Jeremiah Frei-Pearson
- Justin Brasch (2025 Mayoral Candidate)



Adopting by-laws

- If associations want a pattern, they can go to Robert's Rules of Order Newly (RONR) Revised 12th edition.
- Robert's Rules is a framework that is comprised of a set of codes and rules of ethics that helps groups hold orderly meetings that allow the majority to rule while allowing minority voices to be heard.
- When you write bylaws, you need to look at the particular needs of the particular organization.
- RONR gives the pattern; the individual organization writes the details.



Adopting by-laws



Robert's Rules of Order Cheat Sheet

Action	What to Say	Can interrupt speaker?	Need a Second?	Can be Debated?	Can be Amended?	Votes Needed
Introduce main motion	<i>"I move to..."</i>	No	Yes	Yes	Yes	Majority
Amend a motion	<i>"I move to amend the motion by // (add or strike words or both)"</i>	No	Yes	Yes	Yes	Majority
Move item to committee	<i>"I move that we refer the matter to committee."</i>	No	Yes	Yes	No	Majority
Postpone item	<i>"I move to postpone the matter until..."</i>	No	Yes	Yes	No	Majority
End debate	<i>"I move the previous question."</i>	No	Yes	Yes	No	Majority
Object to procedure	<i>"Point of order."</i>	Yes	No	No	No	Chair decision
Recess the meeting	<i>"I move that we recess until..."</i>	No	Yes	No	No	Majority
Adjourn the meeting	<i>"I move to adjourn the meeting."</i>	No	Yes	No	No	Majority
Request information	<i>"Point of information."</i>	Yes	No	No	No	No vote
Overrule the chair's ruling	<i>"I move to overrule the chair's ruling."</i>	Yes	Yes	Yes	No	Majority



Electing Directors and Officers

Many associations have:

- 4 Officer positions
 - President
 - Vice-President
 - Treasurer
 - Secretary
- Between 10-15 members of its Board of Directors.



Electing Directors and Officers

- Officers and Executive Board members are elected at annual meetings to serve terms based on the bylaws that you created.
- Approximately 60 days prior to the Annual Meeting, a Director is appointed by the President to be the “Election Coordinator” responsible for assembling a slate of candidates for the election at the annual meeting.
- The Election Coordinator then contacts the officers and directors who are currently serving and asks if they would like to stand for re-election to serve 1 more year in their current position. T



Electing Directors and Officers

- Approximately 60 days prior to the Annual Meeting, the President sends an email to the FHA membership asking if any member would like to be a candidate for an Officer or Director position or if they would like to nominate someone to be a candidate for an Officer or Director position.
- The President's email directs members who are interested in being a candidate to contact the Election Coordinator so that their name can be added to slate of candidates



Electing Directors and Officers

- At the FHA Annual Meeting the Election Coordinator reads out the slate of candidates for Officers and a voice vote is taken from the members attending the annual meeting.
- Following the election of Officers...the Election Coordinator reads out the slate of candidate for Directors and a voice vote is taken from the member attending the annual meeting.



Attracting volunteers

- Be engaged with your neighbors in a variety of ways and through a variety of activities/events.
- Communicate regularly, effectively, and be organized.
- **Identify needs:** Understand your organization's needs and craft a recruitment message.
- **Use multiple channels:** Recruit volunteers using a variety of channels.
- **Encourage word-of-mouth:** Ask current volunteers to recommend potential candidates.
- **Partner with others:** Form meaningful partnerships with other organizations.



Attracting volunteers

- **Prioritize diversity:** Make volunteerism accessible and prioritize diversity and inclusivity.
- **Screen recruits:** Screen potential volunteers.
- **Use tools:** Use the right tools to recruit volunteers.
- **Communicate expectations:** Clearly communicate expectations to volunteers.
- **Make it fun:** Make the volunteer experience enjoyable.
- **Recognize volunteers:** Recognize and reward volunteers.



Dues and budgeting

PREPARING AND MANAGING YOUR BUDGET

1. Preparing Your Annual Budget
2. Categories to Consider
3. Tracking Spending Against Your Budget
4. Questions



Dues and budgeting

Preparing Your Annual Budget

- **What is your fiscal year (FY)?**
 - o **Established by your Constitution and By-laws**
 - o **Past practice**
 - o **Calendar Year**
- **Get input from those on the Board responsible for the areas you are budgeting.**
- **Look at the previous year's actual spending for each category.**
 - o **Ask other associations who may have done similar things if no useful history exists.**
 - o **Check with potential suppliers for cost estimates.**



Dues and budgeting

Timing

- **Start preparing a working budget early, at least a month before the start of your new FY.**
- **Present to your Board for approval, no later than the first month of the new FY**
- **Summarize year-to-date expenses for each Board meeting.**
 - **Identify any surprises.**
 - **Anticipate future over or under spending.**
 - **Recommend adjustments ,if needed**



Dues and budgeting

Categories to Consider (Income)

Income:

- Dues and Donations from the membership
- Donations from outside the Membership
- One-Time income
- Track by \$ and Households



Dues and budgeting

Categories to Consider (Expense)

- **Administration**
 - PO Box?
 - Insurance (Directors and Officers)
 - CNA Dues
 - Other
- **Annual Meeting**
 - Printing and Mailing of Announcements (to all households, not just prior dues-paying members)
 - Postage
 - Lawn signs
 - Venue
 - Refreshments



Dues and budgeting

Categories to Consider (Expense) continued...

- **Communications**
 - To the association
 - To Board members only
- **Membership**
 - New Residents
 - General membership building
- **Special Events**
- **Other Expenses**



Dues and budgeting

Tracking Spending Against Your Budget

- **Prepare Budget vs. Spending Summary**
 - Monthly or for Board Meetings
- **Track Year-to-Date Spending vs. Budget**
 - Identify specific expenditures since the prior report.
 - Discuss areas of concern (over or under spending for the year)
 - Propose remedial actions, if needed
 - Include month-end bank balance, to help the Board understand their overall financial position.



How to Create a 501(c)(7) in New York

What is a 501(c)(7)?

- A tax-exempt social club under IRS rules.
- For recreation, community events, and social activities.
- Must be member-funded (not public donations or business income).
- Residential associations may qualify if structured properly.



How to Create a 501(c)(7) in New York

3 Simple Steps to Register

1 Form a Nonprofit in New York - File Articles of Incorporation with NY Department of State (\$75 fee).

2 Get an EIN (Tax ID) - Apply free at [IRS.gov](https://www.irs.gov) or use LegalZoom.

3 Apply for 501(c)(7) Status - File IRS Form 1024 for tax exemption.



How to Create a 501(c)(7) in New York

Tax Filing Basics

- IRS Annual Filing (Form 990)- Under \$50K: File 990-N (e-Postcard).
 - Over \$50K: File 990-EZ or 990.
- New York State Filing - Over \$25K revenue?* File with NY Charities Bureau.



How to Create a 501(c)(7) in New York

Final Tips & Resources

- ◆ Keep records of finances & meeting minutes.
- ◆ Not automatically tax-exempt—apply for it!
- ◆ Sales tax exemption** requires a separate NYS form.

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Helpful Links:

- IRS: www.irs.gov
- NY Department of State: www.dos.ny.gov
- NY Charities Bureau: www.charitiesnys.com



Creating and Publicizing Events

- Create events that are inclusive and entertaining across all demographics in your neighborhood.
- Build a dedicated website for your association
- Utilizing email marketing (ex. Mailchimp)
- Leveraging social media platforms (Facebook, Nextdoor, Instagram, Linked In, etc.)
- Collaborating with other neighborhood associations
- Create engaging content
- Running contests (raffles, prizes, etc)
- Utilizing targeted advertising to reach your specific audience



Scheduling meetings

- Meetings can be in person or on Zoom.
- Make meetings as convenient as possible to maximize participation.
- Try to schedule meeting at the same time every month or with some consistency so members can plan ahead.
- Send out agendas one week ahead of the meeting and then at least 1-2 reminders.
- Stick to the agenda and make sure that there is an end time and that you stick to it.



Questions?

Examples of Annual Meeting, Budgeting, By-Laws, Incorporating, and Special Events can be found in the below share drive



WPCNA Workshop Materials
Folder 2024-2025