Developing a Chapter

A Step by Step Guide

This is guide provides step by step instructions for members of IACRN who are interested in developing a chapter in their geographical areas to further the mission of IACRN.

Developed by the Chapter Governance Committee
6/2013 version 1
2/2015 version 2

Developing a Chapter

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http://iacrn.org/

Introduction

IACRN was established in 2008. In 2011, the Board of Directors developed a committee to assist with local chapter development: the Chapter Governance Committee. The charge of this committee is to create a standardized process for chapter development, application process and ongoing support. Successful chapter development is critical to the growth and sustainability of IACRN, advancement of clinical research nursing and recognition as a specialty practice.

Chapters are an integral part of every nursing association and are essential to the growth and fulfillment of its initiatives. Chapters plan and execute educational programs, promote professional development, and provide opportunities for local networking and community building, thereby advancing practice. Through these activities, chapters represent IACRN within their local community and contribute to the growth and support of the association. Individual chapter membership will provide research nurses the opportunity to strengthen the voice of IACRN as we strive for specialty practice designation.

IACRN Chapters are to be comprised of IACRN members in good standing (active membership in IACRN) who share the common vision of enhancing clinical research quality and safety through specialized nursing practice. This entails providing the highest quality care to research participants ensuring excellence in clinical research conduct. Local chapters have the discretion to invite non-members to attend meetings as guests. Guests do not have the same status as members such as voting privileges. Voting members must be members in good standing of the parent organization and the local chapter.

Chapters must uphold IACRN's mission: "to define, validate and advance clinical research nursing as a specialty practice and to support the professional development of registered nurses who directly or indirectly impact the care of clinical research participants".

IACRN Chapters are governed by IACRN Bylaws, Chapter Charter Agreement, and the Chapter Governance Manual.

IACRN chapters promote IACRN's mission in their local communities by:
➢ Promoting and advancing IACRN's mission and vision.
➢ Providing professional development activities for clinical research nurses
➢ Providing networking opportunities to advance research nursing practice

This packet of information will provide a guide for chapter start-up for interested IACRN members. It includes step by step instructions to assist nurses in starting a chapter in their local area. Resources to promote, support and advise local chapters are included.

IACRN will provide the following resources for chapters:

➢   A chapter advisor to assist with start up and ongoing reporting requirements
➢   A chapter section on the IACRN web site to post news and events
➢   Listing of members in your local area

Guide for Starting a Chapter

STEP 1
Exploring chapter interest in your area

First, look at the mission and vision of IACRN. Discuss the idea with clinical research nurse colleagues in your community of practice. Identify the benefits and sustainability of local membership. Outline potential ways that the chapter will support the mission of IACRN such as providing varied educational and networking opportunities for nurses in your area.

STEP 2
Contact the Chapter Governance Committee

Go to the website link for members only and click on chapter
start up guide. This will link you to the email of the Chapter Governance Chair and to a link to download the guide. Once you have reviewed the guide please email the Chapter Governance chair. In the email include your contact information, geographic area for potential chapter and a brief statement as to why you think a chapter will be successful in your area. The pathway is: IACRN members log in. Members Only area: From the drop down menu, click Chapter Startup Guide, Download Guide. Email chapter governance chairperson if you want to get additional information or would like to proceed with plans to start a chapter.

The IACRN Chapter Governance Committee (CGC), a resource for members interested in starting a chapter. The CGC will assign a Chapter Advisor and will consult with you regarding viability of a chapter in your area and steps required to start and sustain a chapter including organizing, planning, marketing and reporting requirements.
The CGC consists of IACRN members from different geographic locations who are appointed by the board and have agreed to develop chapter guidelines and provide ongoing chapter support for the organization. The Board of Directors appointed the first Chairperson in 2011. Thereafter, the CGC Chair selects a Co--from the members of the CGC committee. In most cases, the CGC Co-Chair then assumes the Chair position, in accordance to the CGC succession plan, to lead the CGC.

STEP 3
Review the Chapter Application and IACRN Bylaws and Policies

The application documents are attached to this document for your convenience.
- Chapter Application: Appendix A
- IACRN Bylaws and Policies: please review the most recent bylaws posted to the website at http://iacrn.memberlodge.org/ www.iacrn.org.
- Chapters may not create processes or conduct activities in a way that conflicts with the IACRN parent organization's bylaws, mission or vision.

STEP 4
Develop a preliminary operating plan

In formulating your plans for your chapter it is important that you think about the concepts listed below. It may take some time to develop these ideas but as you start out you should have, at minimum, a basic idea of how you plan to operate as a chapter. As your chapter evolves you may want to draft a mission statement and develop a process to evaluate your activities.
- See sample mission statement: Appendix B
- See sample needs assessment: Appendix B

STEP 5
Establish a leadership team

The chapter's leadership structure can be flexible based on the size and logistics of each chapter. The leadership structure and team should mirror the parent organization's structure to the extent possible. However, the local chapter will have flexibility in its number of officers and leadership structure during start-up and during the pilot phase based on size and capacity. For example, chapters can designate a chair and co-chair at the start or it can elect positions for officers. The suggested officer positions once designated as a chapter affiliate are President, President-elect, Secretary Treasurer, and Member-at-Large. Based on the local chapter's discretion not all positions need to be filled. If unoccupied, the responsibilities of each position must be met by combining positions. The responsibilities of each officer position should be developed and on file locally within year 1 of formal chapter affiliation, or earlier if available. See descriptions of IACRN officer positions in IACRN policies. Local responsibilities should mirror these, but it is expected that there will be some variation based on local preference and operations.

STEP 6
Submit your Preliminary Chapter Application

Following consultation with your Chapter Advisor and or Chair, please submit the preliminary application to the Chapter Governance Chair and Advisor (if assigned) conveying your intent to form a chapter in your area (see Appendix A). By completing this application, you are indicating your intent to form a potential chapter of IACRN. This is a preliminary step only, and does not grant status as a formal chapter. The completed application will be reviewed by the Chapter Governance Chair, Chapter

Advisor and Chapter Governance Board Liaison and then presented to the IACRN Board for consideration to begin the steps required for recognition as an IACRN Chapter. Upon approval of this preliminary application, every Chapter will then have a "Pilot phase" to assess viability and sustainability before a chapter charter application is submitted and/or chapter status is granted. Your Advisor will notify you when pilot status is approved or denied. If the preliminary application is denied, your Chapter Advisor will provide recommendations for next steps (for example, ways to strengthen your application if desired). When your application is received a number will be assigned. This number will be unique to your group and will stay linked to your chapter going forward. See the current list as of March 2015 below:

001 Boston Chapter Affiliate, 2013
002 Ohio Valley, Pilot - 2014
003 Rocky Mountain Pilot - 2014
004 Northeastern Oklahoma Pilot - 2015

STEP 7
Plan your first meeting

The first meeting for the chapter is a very important step in the organizational process. Consult with your Chapter Advisor for advice on preparing for this meeting and to request a list of current members in your area. Use the following checklist to be sure you have covered all bases in your planning process. When selecting a meeting site, choose one that is centrally located to your targeted membership.

The logistics
- Establish a time and date
- Book a room
- Decide on meeting frequency and upcoming dates
- Identify marketing strategy
- Designate a person to record meeting minutes
- Decide whether you will offer snacks and include in your meeting announcements
- Send announcements (see samples in Appendix B)
    - Announcements should be staggered and at least 3 per meeting is a good target (for example, announce the meeting, then follow up with a save the date, and a final reminder closer to the actual meeting date)
    - Chapters are not permitted to use IACRN's logo until authorized by the IACRN parent organization.
- At the meeting bring with you
    - Sign in sheets
    - Location signs (to place in lobby or key locations)
    - Pens, paper, name tags
    - Copies of agenda
    - Contact info for officers (see sample in Appendix B)

Preparing the agenda (see sample in Appendix B)

- Incorporate a business meeting into the agenda
- Introduce officers
- Discuss membership and dues structure
- Emphasize that all chapter members must be members of IACRN
- Define the purpose of the meeting and the potential chapter goals.
- Ask your potential chapter member what they need/want from a chapter
- Decide on the featured program
    - If you plan to offer CEUs leave adequate time for planning and preparing required paper-work ahead of time. CEU applications and any expenses incurred are the responsibility of the local chapter.
- Incorporate IACRN mission, vision and goals into the agenda

Other ideas

- Get acquainted or icebreaker (usually a one-half hour time block, including sign-in with refreshments)
- Discuss future activities related to the chapter goals
- Preview future meetings and activities
- Inform potential members of the benefits of local chapter membership and of full IACRN membership

STEP 8
Develop a marketing/communication plan

- Collect contact information for research nurses in your area. Be sure to include all nurses in academic and/or private medical centers, pharmaceutical or devices companies or CROs, and research educational support settings.

- You may request a **free** listing of IACRN members within the geographic area of your chapter by contacting the IACRN (iacrn@iacrn.org).

- Send an announcement of your Chapter's upcoming meeting. You may also request announcements be posted to the IACRN website by contacting iacrn@iacrn.org (see samples in Appendix B)

- Consider other marketing venues such as announcements to alumni and graduate nursing associations, schools of nursing and local newspapers, and hospital newsletters.

- The marketing plan should be ongoing, progressive and demonstrate creative alliances.

STEP 9

Once Pilot status has been granted, you will be responsible to continue to communicate with your Chapter Advisor and to conduct all activities as per IACRN bylaws. The communication required is listed below.

- 6 months after pilot status has been granted, the chapter leaders should provide a brief update regarding their chapter progress. This can be done via email or phone and does not require an official report per se.
- Annually, you are required to submit a summary of activities to your Chapter Advisor which includes:
    - Meeting agendas and minutes
    - Number of attendees at each meeting
    - Number of chapter members must be included. All chapter members must be active members of IACRN parent organization. You may send a list to check this requirement to iacrn@iacrn.org.
    - Leadership contact information
    - Fiscal records if applicable
    - A brief description of progress for the past year and goals for the subsequent year
- The annual report is due no later than 60 days from the 1 year mark of approval as Pilot status.

Other responsibilities during this period include the following:

► Communicate with your Chapter Advisor to discuss progress and any areas of concern.

► Meet at least annually as a leadership team to discuss goals, evaluate progress and develop a strategic plan.

► Keep minutes of the meeting(s) on file.

► Formulate plans for the next year.

► Utilize the listing of members provided by IACRN to confirm membership status of local chapter members.

STEP 10
Naming the Chapter

If you have been approved as a Pilot Chapter, you will identify your chapter as *your geographic area Chapter of the International Association of Clinical Research Nurses* (see sample Appendix B*)*. The IACRN logo cannot be used without authorization by the IACRN parent organization and must be used in accordance with Bylaws. All chapter logos will be standardized and must be approved by IACRN. (see sample in Appendix B)

STEP 11
Chapter Finances

Local Chapter Member Dues

Chapter membership dues are optional and up to individual chapters to designate and manage. This may be subject to change as the parent organization evolves and all chapters will be notified in advance of any change in this process. Dues are used to offset chapter expenses for example: postage, printing or refreshments for chapter meetings. If a chapter determines dues are necessary to maintain the operations, dues should be priced to meet your chapter's necessary expenses, but not so high that they will discourage anyone from joining. Annual Chapter dues may not exceed 60 dollars or two thirds the amount of current annual IACRN dues. Chapter dues average about $15-25 per year. All members of chapters must be members of IACRN.

If you will be collecting dues, your chapter must open a bank account under the chapter's name (preferably interest bearing or, at least, without a maintenance fee). Many banks waive account fees for non-profit organizations. IACRN and its chapters are non-profit organizations, 501(c6). You will need to establish a non-profit entity under the laws of your local jurisdiction and adhere to all reporting requirement but will be able to open your bank account before this process has been completed. The legal entity (the chapter) will then obtain its own tax identification number (EIN) from the IRS. There may be an expense to the chapter and this should be considered when setting annual dues. The chapter must create and submit their plan for collecting and managing dues for approval by their chapter advisor before they begin to collect money. See sample chapter dues SOP (Appendix B)

For chapters developed in countries other than the United States local rules will be followed.

Accurate records are essential. Develop a simple financial sheet to track the flow of funds to and from the treasurer. (See sample in Appendix E) Alternatively, you could utilize a software program such as Excel, Quicken or Mint for example to manage your chapter finances. You must keep records of dues received, all expenses and active membership lists. You can contact your Chapter Advisor to talk about your chapter's financial matters as needed.

STEP 12
Apply for Your Chapter Charter

After completing a successful pilot phase of at least 1 year and upon the approval and recommendation of your chapter advisor, the next step is to apply for your chapter charter. All chapters must be chartered by IACRN. The Charter Agreement (available through your Chapter Advisor), along with the IACRN Bylaws, are the governing documents for the chapter. The purpose of the Chapter Charter Agreement is to clearly identify the expectations and obligations of both the chapter and of IACRN. The Charter is designed to protect the interests and non-profit tax status of both parties.

The following information needs to be completed to process your charter application. Further information can be found in The Chapter Charter Agreement. Chapters may find the reviewer's checklist helpful as they prepare their application (see Appendix B)

- Charter Agreement - All officers should review the Charter Agreement and the President and Treasurer will sign. (Additionally, anytime you have new officers, the charter should be reviewed with them as part of their orientation to their new role.)
- Mission statement
- Copy of past meeting agendas
- Pilot phase financial records (if applicable)
- List of Chapter Officers (and description of responsibilities if available)
- List of Chapter Members

These documents along with a cover letter should be submitted to your Chapter Advisor for review. It will then be presented to the IACRN Board for approval or modification. You will receive feedback and an official designation as a chapter if approved. In the meanwhile your chapter advisor will provide guidance and oversight during the development process until a formal judgment has been rendered by the IACRN Board.

STEP 13
Establish Committees as needed

► Committee formation may be an important part of chapter leadership and sustainability. Each chapter can decide if and when to develop committees and what committees would best serve their chapter needs. There are two types of committees: the standing committee and the task force. You might want to form a task force to accomplish a specific project. The life of a task force is limited (such as developing a needs assessment) and it is dissolved once it has accomplished the task it was formed to complete. Examples of standing committees include: Program or Education Committee, Membership Committee, Nominating Committee, and others per local discretion.

STEP 14
Resources & Future Planning

Potential chapter resources are discussed in section 5.0 of the Chapter Charter Agreement (available upon request). Once you have an established chapter, the process for ongoing evaluation and strategic planning must continue. Chapters must act in accordance with IACRN bylaws at all times.

APPENDIX A
INITIAL APPLICATION FOR INTENT TO FORM AN
IACRN CHAPTER

Following consultation with your Chapter Advisor, please complete this form and submit to your Chapter Advisor and Chapter Governance Chair. By completing this form you are indicating your intent to start a potential chapter of IACRN. This is a preliminary step only, and does not grant status as a formal chapter. The completed application will be reviewed by your Chapter Advisor and Chapter Chair and presented to the IACRN Board for consideration to begin the steps required for formal recognition as an IACRN Chapter. Upon approval of this preliminary application, every Chapter will have a "Pilot phase" to assess viability and sustainability before a chapter charter application is submitted and/or chapter status is granted.

President or chair person's Name:

_____

Proposed name of chapter: _____
once approved all chapters will be named as geographic area Chapter of the International Association of Clinical Research Nurses. For example Boston Chapter of the International Association of Clinical Research Nurses.

Phone number:_____ Email Address: _____

IACRN membership #: _____

Geographic target area of chapter: _____

Founding member(s):
_____
_____
_____

Please submit a brief description of your strategic plan including the need for a chapter in your area. Describe the population of research nurses who would be your potential membership (number, areas of employment etc) and targeted geographic area. Include information on your marketing strategy, leadership plans, fiscal needs and tracking mechanism, meeting agenda and/or minutes and preliminary mission statement.

Chapter Advisor use only

Date received: _____   Reviewed by: _____

Date reviewed by CGC: Reviewed by: _____

Date reviewed by IACRN Board: _____

Date pilot chapter status approved: _____ IACRN President or delegate signature: _____

OR

Date further consultation recommended/not eligible for pilot status at this time: _____ IACRN President or delegate signature:
_____

Comments:
(this space can be used by the Chapter Advisor to document correspondence with potential chapter leaders)
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

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Appendix B: Resources

1. <u>Sample</u> Chapter Mission Statement and Leadership

BOSTON Chapter of IACRN

<u>Sample</u> Mission Statement

Research nurses make a unique contribution to the research team by providing their clinical expertise to deliver safe, effective, quality nursing care to participants enrolled in clinical studies.

The mission of the Boston Chapter of IACRN is to provide a forum for Research Nurses, Research Nurse Practitioners, and other interested nurses to discuss issues common to this specialized practice.

Working collaboratively with the IACRN, the Chapter will provide an opportunity to discuss and define the unique skill set, body of knowledge, and clinical expertise that Research Nurses contribute to the research team. The Chapter also provides a vehicle for problem solving, networking, professional development, and building relationships across Boston and greater New England.

Officers
Boston Chapter of IACRN

President **Mary Larkin, MS, RN** **Massachusetts General Hospital** **Mlarkin1@partners.org**	**Treasurer** **Lauren Donahue, RN, BSN** **Brigham and Women's Hospital** **Ldonahue1@partners.org**
President Elect **Linda Pitler, RN, MS, CCRC** **Massachusetts General Hospital** **lpitler@partners.org**	**Secretary** **Kerry Milaszewski, BS, RN, CDE** **Joslin Diabetes Center** **Kerry.Milaszewski@joslin.harvard.edu**
Vice President/Membership Chair **Amy Sbrolla, RN, BSN, ACRN** **Massachusetts General Hospital** **asbrolla@partners.org**	

Appendix B: Resources

    2. Sample Chapter Meeting Announcement

Dear Research Nurse Colleagues,

Please join us for the next meeting of the Boston Chapter of IACRN to be held on Thursday, October 13 at 6:00 PM for a discussion of Ethical Challenges in Clinical Research Nursing. CEUs will be provided.

The International Association of Clinical Research Nurses (IACRN), the first professional organization devoted to clinical research nursing, is expanding to encompass local area chapters. We were thrilled to have such a great turnout for our inaugural Boston chapter meeting in June and look forward to seeing everyone in October.

Meeting location: Carrie Conference Room, Brigham and Women's Hospital, Boston

The Carrie Hall Conference Room is located on the 2nd floor "Pike" of Brigham and Women's Hospital near the 15 Francis Street entrance (Peter Bent Brigham building).

Directions to this conference room:
Enter through the hospital's 15 Francis Street entrance, located at the corner of Francis St. and Huntington Ave.
Upon entering the lobby, take a right at the security desk.
Carrie Hall is located at the end of this hallway, directly in front of you.

Please RSVP to bostoniacrn@gmail.com.

Amy Sbrolla, Mary Larkin, Linda Pitler, Kerry Milaszewski and Lauren Donahue

www.iacrn.org

Appendix B: Resources
3. Sample Meeting Agenda

Boston-IACRN
March 8, 2012; 5:30-7:00 PM, Carrie Hall, Brigham and Women's Hospital

Business Meeting (M Larkin) 25 mins
1) Welcome/Intros 5 mins
2) Announcements
  - Next IACRN meeting in Houston October 17-20 2012
  - See IACRN web site http://iacrn.memberlodge.org/ www.iacrn.org
  - Active membership in IACRN is $100.00/year
3) Update on chapter development status (15 mins)
  - Pilot chapter designation
  - IACRN now has a CDC to develop a process for groups interested in becoming chapters
  - Dues for Boston chapter
    - Wait to hear back from IACRN on chapter guidelines
4) Message from the IACRN President: Shaunagh Browning
5) Future meetings
    o Meeting dates
      - 3 meetings per year
      - June 14 2012 (2012/2013 schedule TBA in June)/Rotating locations
    o Suggestion re future meeting CEU topics/speakers
6) Working committees
    o Program Committee Chair: Kerry Milaszewski

Program: Panel presentation 60 mins (45 mins with 15 mins Q&A)

Charlene Malarick, RN, BSN, CCRC , Senior QA/QI Specialist
Human Research Quality Improvement Program; Partners Health Care
Expertise: Quality control, education, and regulatory documentation.

Lauren Donahue, RN, BSN,Outpatient Research Nurse
Center for Clinical Investigation; BWH

Kerry Milaszewski, BS, RN, CDE, Pediatric Nursing Research Coordinator
Diabetes research in the pediatric, adolescent and young adult population; Joslin
Diabetes Center

Laurie Lawler, RN, Research Nurse
Pulmonary Vascular Disease; BWH

Diane L. Carroll, PhD, RN, FAAN, FAHA, Yvonne L. Munn Nurse Researcher

Munn Center for Nursing Research;   Institute for Patient Care, Massachusetts General Hospital
Chair, Panel B; Human Research Committee, Partners HealthCare
Expertise: Nursing Research

Re-cap (M Larkin) (5 minutes)

Sample Chapter logo upon permission by IACRN
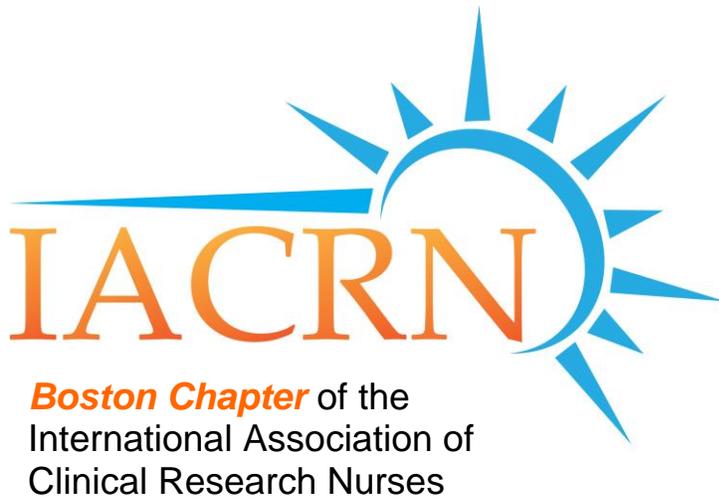
Place Your
Chapter/Pilot Chapter
Logo Here

Appendix B: Resources:
4. Sample Business Meeting Agenda Template

Name of Your Chapter - IACRN
Date of Meeting,
Location of Meeting

Business Meeting: Chapter President 25 mins
1) Welcome/Intros 5 mins
2) Announcements
- Next IACRN annual conference meeting in City, Date
- Refer members to IACRN web site http://iacrn.memberlodge.org/ www.iacrn.org
- Active membership in IACRN is $100.00/year; now have a 2-year membership option.
3) Update on chapter development status (15 mins)
5) Future meetings
  - Meeting dates: list dates for the year or next meeting date / location
  - Suggestion re future meeting CEU topics/speakers
6) Chapter committee updates
  - Program Committee Chair
  - Nominating committee

Program Introduction: Introduce Presenter
Program: 60 mins (45 mins with 15 mins Q&A)

Re-cap of Meeting: Chapter President (5 minutes)

Appendix B: Resources:
5. Sample Needs Assessment

BOSTON-IACRN Needs Assessment (2011-2012)

The founders of the BOSTON-IACRN would like your feedback to assess interest in local Chapter activities. Please complete this needs assessment. Do not include your name. Comments are welcomed.

In section A please √ 5 topics that interest you most. Choose 5 and place a * next to the 2 that you think are most important.

A. Choose your top 5 and star * two as the most important to you
_____ Informed consent
_____ Recruitment and retention of study volunteers
_____ Steps in research study implementation
_____ Research nurse resources
_____ Communication with other members of study team
_____ Defining research nurse role
_____ Developing your own research
_____ Spotlights on practice
_____ Ethical dilemmas in research nursing practice
_____ Financial aspects of study management
_____ Quality and safety

In section B please √ what types of learning venues you would like. Choose 3 and place a * next to the 2 that you prefer.

B. Choose your top 3 and star * two as most preferred
_____ Journal club (article reviews and discussion)
_____ Spotlight on practice (presentations by peers re: their role)
_____ Presentations from fellow research nurses (on topics of interest)
_____ Guest speakers
_____ Case studies
_____ Topic based discussions (all attendees led by facilitator)

In section C please √ what is most meaningful to you about attending local chapter meetings. Choose 3 and place a * next to the 2 that are most meaningful to you.

C. Choose 3 and place a * next to the two that are most important to you

_____ Enhanced knowledge
_____ Networking with nurses in similar roles
_____ Heightening awareness of role
_____ Advancing professional practice of research nurses
_____ Professional development

D. Comments/Suggestions

_____

_____

_____

Reference: Larkin et al, Building Communities of Practice, Clin Trans Sci 2012; Volume #: 1–4.

Appendix B: Resources:
6 Sample Starter Expense Spreadsheet

(Sample) 2011 IACRN-Your Chapter Annual Expenses

Tracking of income and expenses is essential for tax reporting purposeS

Chapter Income		**Total Income**	**$xxx.00**
Membership dues	$xxx.00	**Total Expenses**	**$xxx.00**
	$xxx.00	**2011 Net**	**$xxx.00**
Total income	$xxx.00		
Admin Expenses			
Advertising			$xxx.00
Web page			$xxx.00
Meeting Expenses			
Mar	location	snacks	$xxx.00
		paper goods	$xxx.00
		drinks	$xxx.00
		copying	$xxx.00
		postage	$xxx.00
		Speaker expense	$xxx.00
Mar Total			$xxx.00
June	location	snacks	$xxx.00
		paper goods	$xxx.00
		drinks	$xxx.00
		copying	$xxx.00
		postage	$xxx.00
		Speaker expense	$xxx.00
June Total			$xxx.00
November	location	snacks	$xxx.00
		paper goods	$xxx.00

		drinks	$xxx.00
		copying	$xxx.00
		postage	$xxx.00
		Speaker expense	$xxx.00
November Total			$xxx.00
Year Total			$xxx.00

Appendix B: Resources:
7 Sample Dues SOP

Sample Dues SOP

Membership Type and Dues
a. IACRN (parent association) annual active membership dues currently $100 (as of January, 2015).

b. Boston Chapter of IACRN- annual active membership dues $20. *If members of the board would like to increase the annual membership dues, a vote will take place at one of the meetings.*

c. Boston Chapter of IACRN-members must also be a member of the IACRN parent organization. The Boston Chapter treasurer/board member will check the parent association membership status of the Boston Chapter of IACRN-member at the time they join the Boston Chapter and at the time of their Boston Chapter yearly renewal. The treasurer/board member will check membership status according to IACRN policies. The Boston Chapter of IACRN treasurer/board member will work with the parent IACRN to access membership status as permitted by the IACRN parent association.

d. Potential Boston Chapter members may attend two meetings without paying dues to the IACRN parent organization or the Boston Chapter. After potential members attend two meetings, they will be asked to make their decision on joining. Guests who are present at meetings will not have voting privileges unless they are an active member of both the IACRN parent organization *AND* the Boston Chapter of IACRN.

II. Payment of Dues

a. The Boston Chapter has obtained **a federal tax ID number, which is: 46-2341395. The current legal status of the Chapter is as a nonprofit, unincorporated, 501(c6)"Association". By operation of Massachusetts state law, the Chapter is a *non-profit* organization.**
b. Payment of dues (currently $20 as of April 2013) may be made by the following methods:
    1. Personal Check made out to Boston Chapter of IACRN.
    2. PayPal: If the member has a PayPal account, they may make a payment to the Boston Chapter of IACRN through the PayPal system. If the member does not have an active PayPal account, they may provide their e-mail address to the treasurer and the treasurer will e-mail the member an invoice through the PayPal

system. The member will then follow instructions given on the invoice to make a
payment through the PayPal system.

c. A checking account held at local bank will be maintained by the Boston Chapter of IACRN
Treasurer. Personal checks for membership fees will be deposited into the checking
account. Periodically (when the PayPal acct balance exceeds $200), the money will be
transferred from the PayPal account into the checking account. The deposits and transfer
of funds will be recorded in a Treasurers Report and will available for review by the
Boston Chapter's Board and by the IACRN parent association. A formal report will be
provided on an annual basis to the IACRN Parent Association.
d. Use of money by the Chapter will be in accordance with IACRN policies.

Appendix B: Resources:
8 Chapter Advisor Checklist

Chapter Governance Committee

Advisor Checklist

This list can be used by the chapter advisor (or in circumstance where an advisor has not
been assigned the members of the CG committee will be asked to review the application) to
evaluate if a pilot chapter has met the criteria for recognition as a chapter affiliate of IACRN.
If all criteria have been met to an acceptable degree the recommendation will be made to the
CG chair(s) that the reviewer is in favor of chapter affiliate recognition. Please refer to the
Step by Step Guide to Developing a Chapter for more information.

Pilot Chapter Name: _____

Date recognized as Pilot Chapter: _____

The following steps and materials must be completed for recommendation as a chapter
affiliate. Place an X in the appropriate column if the materials have been submitted and are
of acceptable quality. There is a column for comments if needed.

Item	Submitted (Yes/No)	Acceptable (Yes/No)	Comments
Cover letter			
Meeting agendas/minutes			
Mission Statement			
Leadership list/contact info			
# of attendees at meetings			
Tracking method for listing of IACRN members • If website based must			

include security plan			
Names of members sent to Membership Chair			
Fiscal records if applicable (if collecting dues) • If applicable: sponsorship agreements (including tax exemptions) and plans			
Description of progress and goals			
Leadership meeting minutes (at least annually)			
Charter application			

Reviewer: please indicate your decision for your recommendation of chapter affiliate status below.

Reviewer Name: _____   Date: _____

_____ Recommend   _____ Do not recommend at this time

<div align="center">Chapter Governance Committee
Chapter Advisor Role</div>

Introduction
IACRN Chapter Advisor communicates with, supports and mentors chapter leaders during chapter start-up and serves as a resource throughout the life of the chapter.

Role
The Chapter Advisor functions as a link between the local or proposed chapter and the Chapter Governance Committee, and ultimately the IACRN Board. This ensures communication between the local chapter and the parent association. The Chapter Advisor consults with local chapters regarding viability of starting a chapter, steps required to start and sustain a chapter including organizing, planning, marketing and reporting requirements. The Advisor will assist during the planning and application for pilot status and when/if a transition is made to full chapter affiliate.

Qualifications
Advisors are members in good-standing of IACRN and the Chapter Governance Committee, have a working knowledge of the chapter start-up process through reading the *Step by Step Guide* and are willing to provide suggestions for resources to help manage issues that local chapters might encounter.

Responsibilities
• Promote the vision and mission of IACRN at local chapter level
• Provide support and advice to local chapters

- Use the *Step by Step Guide* to frame communication with local chapter
- Communicate with Chapter Governance chair(s) about chapter status
- Review and present recommendation for approval to Chapter Governance chair(s) of the preliminary application and charter
- Review 6 month and annual chapter reports (see guide)
- Assist/provide support during transitioning phase from pilot to full chapter

Time commitment:
Variable, approximate estimate 1-2 hours per month at most

Revised January 2015, M Larkin, L Pitler, B Harper