

Getting Started Manual

Welcome to APHON Local Chapters

We are excited that you are interested in starting a local chapter and we share your enthusiasm and commitment to our nursing specialty. The following pages provide a brief overview of the steps required to start a new local chapter of the Association for Pediatric Hematology/Oncology Nurses (APHON).

Advantages of Chapter Formation

The formation and maintenance of a local chapter has many advantages for APHON and its members. Local chapters provide ongoing peer support as well as numerous opportunities for networking and the exchange of ideas and information through meetings, correspondence, committees, conferences, and publications. By opening a direct line of communication to the national organization, local chapters provide a medium for voicing opinions and developing ideas. APHON's chapters enhance cooperation with other professional associations, hospitals, universities, industries, technical societies, research organizations, and governmental agencies in issues affecting quality care of the pediatric cancer patient. Chapters foster unity of purpose in furthering the objectives of the national organization. Finally, chapter formation promotes structure, group development, and the opportunity for leadership with APHON.

Getting Started

The process of starting a local chapter begins when a group of individuals who are committed to the new chapter begin to meet regularly. There are three requirements for a local chapter to get started.

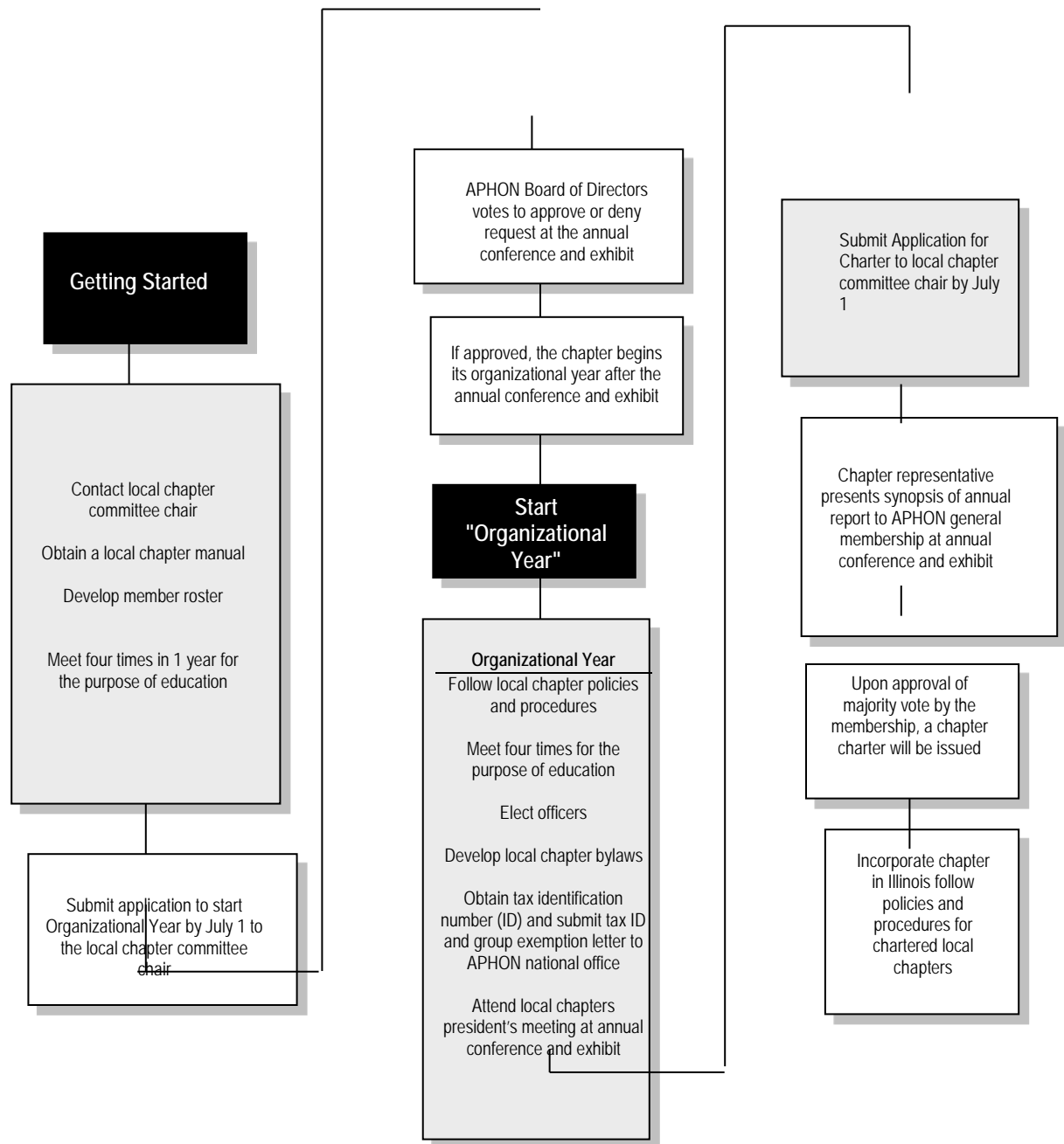
1. Meet four times for the purpose of education within 1 year.
2. Develop a roster of your local chapter members.
3. Submit the organizational year application by July 1 of the year you intend to begin your organizational year.

While not a requirement, chapters who are getting started usually need to meet at times other than educational meetings for the purpose of organization and chapter business. These are called business meetings. Business meetings can be combined with an educational meeting, but they do not replace the educational meetings. Chapters who are getting started can also name their chapter, elect officers, and begin collecting dues in preparation for the next step. These are not required until the organizational year, but many chapters find it helpful to begin these tasks as soon as possible.

Most chapters complete the requirements to apply for their organizational year in 10–12 months, but they can be completed in as little as 6 months. The Getting Started phase ends when the forming chapter meets their requirements and the APHON board votes to approve the chapter to begin their Organizational Year at the annual conference and exhibit.

A local chapter manual is available to assist you in starting and maintaining your local chapter. This manual can be obtained from the APHON national office by calling 847.375.4724. The local chapter manual is not your only resource as you take the steps toward becoming a chartered local chapter. The local chapter committee chair, local chapter committee liaison, APHON staff liaison, and the APHON board are available to support you, answer questions, clarify details, and walk you through every step of the way as needed. As you go through the Getting Started requirements and then the Organizational Year, the local chapter committee chair will be in frequent contact with you, and closely follow your progress. Please contact the local chapter committee chair if you are interested in starting a local chapter.

Forming a Local Chapter



About the Local Chapter Committee

The local chapter committee provides a major link between the APHON board and APHON membership. This committee helps chapters to get started, maintain their activities, and provides a major source of communication between APHON members, local chapters, and the board. The committee is made up of one chair and four vice chairs. These individuals have been active within their own local chapters and understand the concerns, problems, and questions of local chapters. The chair of the local chapter committee assists chapters who are getting started and chapters in their organizational year while vice chairs are the resource for chartered local chapters. Each vice chair is assigned several chartered local chapters to assist with chapter operations, encourage, communicate information, ensure that reports are completed on time, and celebrate your accomplishments. Visit the APHON [website](#) for the current committee list.

Ideas for Local Chapter Formation

- Consider sending a letter to hospital education directors, directors of nursing, oncology unit supervisors, hematology/oncology physician's offices, radiotherapy departments, nursing school faculties, home healthcare companies, etc., and invite pediatric hematology/oncology care givers to an information meeting.
- Plan a series of educational programs (a minimum of four per year required) and advertise via the agencies and individuals above.
- Apply for continuing education units (CEUs) through your state accrediting agency or your institution's education department. If CEUs are not available, develop a certificate of attendance.
- Charge an attendance fee for non-APHON members and no fee for APHON members as a way to encourage individuals to join your chapter.
- Seek financial support for printing and mailing expenses from organizations such as your local American Cancer Society or your employer.
- Seek financial support for dinner or refreshments for your educational meeting from drug companies and promote the dinner when advertising the meeting.
- Consider the needs and geography of your area in planning meeting sites. This may mean selecting a central location or rotating meetings between hospitals.
- Consider promoting activities that will facilitate peer support and networking such as social time or refreshments during a part of the meeting
- Keep minutes of meetings to be distributed to interested individuals on a regular basis. This will help maintain the level of interest, as well as serve as a means of communication. Also, such material will serve as evidence of activity when applying for your organizational year.
- Obtain extra membership applications and brochures from APHON to have on hand at your meetings. Help us ensure that all local members are national members.
- Display APHON's membership information near flyers about meeting dates, times, and topics.
- Start a "bring a member" campaign over a pot-luck organizational meeting.

Ongoing Requirements

Once your chapter has achieved chartered status the following requirements must be met on an ongoing basis:

- Meet at least four times per year for the purpose of education
- Hold one business meeting which can be held in conjunction with an education meeting
- Submit annual activity report, financial report, authorization form, and officers report
- Bi-annual review of local chapter bylaws

The chapter president or an elected leader of the chapter is required to attend the annual local chapter webinar.

Forming a Local Chapter

2-1 Getting Started

Introduction (Advantages of Chapter Formation)

The formation and maintenance of a local chapter has many advantages for APHON and its members. Local chapters provide for ongoing peer support as well as numerous opportunities for networking and the exchange of ideas and information through meetings, correspondence, committees, conferences, and publication. By opening a direct line of communication to the national organization, local chapters provide a medium for voicing opinions and developing ideas. APHON's chapters enhance cooperation with other professional associations, hospitals, universities, industries, technical societies, research organizations, and governmental agencies in issues affecting quality care of the pediatric hematology/oncology patient. Chapters foster unity of purpose in furthering the objectives of the national organization and promote structure, group development, and the opportunity for leadership within APHON.

Getting Started Year

Meet four times
Develop member roster
Submit org. year
application

Organizational Year
Application
Form START - A

Getting Started

The process of starting a local chapter begins when a group of individuals who have committed to starting a local chapter begin to meet regularly. There are three requirements for a local chapter to get started:

1. You must meet four times for the purpose of education within 1 year (or less).
2. You must either discuss business for a portion of your educational meetings or hold a 5th meeting to do so.
3. You must develop a roster of your local chapter members.
4. You must submit your "organizational year application" by July 1 of the organizational year.

The application to start your organizational year can be found in Appendix 1. It must include:

- application form to start organizational year with completed check list
- summary of your chapter history
- summary of four educational programs
- membership roster
- meeting minutes.

While not a requirement, chapters who are getting started usually need to meet at times other than the
8735 W. Higgins Road, Suite 300, Chicago IL, 60631 Tel: 800.202.9760 (U.S. residents) 847.375.4724 (non-U.S. residents) Fax: 847.375.6436

educational meeting for the purpose of organization and chapter business. These are called business meetings. Business meetings can be combined with an educational meeting, but they do not replace the educational meetings. Chapters who are getting started can also name their chapter, elect officers, and begin collecting dues in preparation for the next step. These are not required until the organizational year, but many chapters find it helpful to begin these tasks as soon as possible.

This manual is designed to assist you in starting and maintaining a local chapter. You are not, however, on your own as you take the steps toward a chartered local chapter. The Local Chapter Committee Chair, Local Chapter Committee Liaison, APHON staff, and the APHON board are available to support you, answer questions, clarify details, and guide every step of the way if needed. As you go through the initial requirements and then the “Organizational Year,” the Local Chapter Committee Chair specifically will be in frequent contact with you and closely follow your progress.

Most chapters complete the requirements to apply for their organizational year in 10–12 months, but they can be completed in as little as 6 months. The Getting Started phase ends when the forming chapter meets their requirements and the APHON board votes to approve the chapter to begin their Organizational Year at the Annual Conference and Exhibit.

Suggestions for Local Chapter Formation

- Consider sending a letter to hospital education directors, directors of nursing, hematology/oncology unit supervisors, hematology/oncology physician’s offices, radiotherapy departments, nursing school faculties, home health care companies, etc., and invite pediatric hematology/oncology care givers to an information meeting.
- Plan a series of educational programs (a minimum of four per year required) and advertise via the agencies and individual above.
- Apply for continuing education units (CEUs) through your state accrediting agency or your institution’s education department. If CEUs are not available, develop “certificate of attendance” forms.
- Charge non-APHON members an attendance fee as a way to encourage individuals to join your chapter.
- Seek financial support for printing and mailing expenses from organizations such as your local American Cancer Society or employer.
- Seek financial support for providing a dinner at an educational meeting from drug companies and promote the dinner in advertising the educational meeting.
- Consider the needs and geography of your area in planning meeting sites. This may mean selecting a central location or rotating meetings between hospitals.
- Consider promoting activities that will facilitate peer support and networking such as social time or refreshments during a part of the meeting.
- Keep minutes of meetings to be distributed to interested individuals on a regular basis. This will help maintain the level of interest, as well as serve as a means of communication. Also, such material will serve as evidence of activity when applying for your organizational year.
- Obtain extra membership applications and brochures from APHON to have on hand at your meetings. Help us ensure that local members are national members.
- Display APHON’s membership poster near flyers about meeting dates, times, and topics.
- Start a “bring a member” campaign over a pot-luck organizational meeting.

2-2 Organizational Year

Introduction

The organizational year is designed to allow chapters time to organize and strengthen chapter membership and function. The new tasks of the organizational year provide valuable experience for the upcoming years as a chartered chapter. When chapters complete the requirements of the organizational year they may apply to the APHON board to become a chartered APHON local chapter.

The Organizational Year to Charter

During their organizational year chapters continue to follow local chapter policies and procedures by meeting a minimum of four times for educational purposes, soliciting members, ensuring national membership status, collecting dues, and electing officers if not previously done.

Organizational Year Resources

- Local chapter chair
- Local chapter vice chair
- Local chapter manual
- Forming a Local Chapter Workshop at the Annual Conference and Exhibit.
- Other local chapter presidents, board members, and members
- APHON national staff

Additional Organizational Year Requirements

- Develop local chapter bylaws and submit to APHON Bylaws committee chair.
- Obtain tax identification (ID) number and submit to APHON
- Complete group tax exemption letter
- Apply for incorporation status
- Ensure that the local chapter president or a representative attends the local chapter meeting at APHON's Annual Educational Conference and Exhibit
- Maintain communication with Local Chapter Committee Chair
- Submit an application to become a Chartered Local Chapter with supporting reports to APHON by July 1 of the chapter's Organizational Year
- Present a report of chapter activities to the general APHON membership at the APHON Annual Conference and Exhibit
(Tax ID#, tax exempt status, and incorporation is explained in detail in the Financial Issues chapter of this manual.)

3-2 Employer Identification Number (EIN)

Introduction

A chapter is a legal entity. It is important to realize the implications of that situation and to structure the chapter in such a way that it can function effectively and without liability (responsibility) to its leadership or members. It is equally important that APHON maintain control and supervision of chapter activities so they do not violate not-for-profit requirements or transfer liability to APHON.

Because of the importance of these issues, chapter leaders often are not aware of the various requirements and implications of chapter functions, and because the APHON Board of Directors is ultimately responsible for the organization, the board has established certain chapter regulations, expectations, and procedures. These pages describe the purposes and procedures for identification numbers, tax exemption, and incorporation. We hope they will get you through these processes with a minimum of effort.

EINBasics

The purpose of tax exemption is to identify the chapter as an organization to the government. In addition, a tax identification number is needed to open a bank account. Chapters of APHON must obtain a tax identification number during their organizational year. After obtaining an EIN from the Internal Revenue Service (IRS), chapters must submit the forms in Chapter—Section A-2. This process must be completed before becoming a chartered chapter.

TIN Basics

Must obtain EIN number in Organizational Year.

There is no cost to obtain a EIN number.

There are several advantages that chapter officers need to know about tax exemption. First, there is no cost for obtaining a tax identification number. Second, never use your personal social security number or APHON's tax identification number to open a bank account or for any other reason. Using a personal social security number on a bank account places the responsibility for that account on the holder of the number. That means the individual is liable for taxes on the money in the account, which is automatically reported to the IRS by the bank. It also means the funds could be attached to a bankruptcy or other proceeding against the individual at any time.

Obtaining an EIN

You may obtain a SS-4 form by contacting the APHON national office.

APHON Chapters cannot use APHON's EIN.

1. When you receive the form call back and ask for a customer service representative. They will ask for the information from Form SS-4 and issue the EIN number over the phone.
2. Write the EIN number in the upper right hand corner of the form. Sign, date, and mail or fax the form to the IRS regional office within 5 days of your phone call.
3. You may also apply for a EIN number by sending in the completed IRS form SS-4.
4. Once you have received your EIN number, make a copy for your chapter's records and make and send a copy to the APHON national office.

Purpose

The purpose for tax exemption is to distinguish the chapter as a not-for-profit organization that should be exempt from federal income tax. There are several guidelines which must be followed to be included in APHON's group exemption letter to IRS so chapters do not have to file with IRS on their own. These guidelines are listed below:

1. Chapters must participate in APHON's group exemption process beginning in their organizational year. A chapter that has not applied for tax exemption will be considered a for-profit organization by the IRS and will be held liable for taxes. (This is against APHON's policies and procedures.)
2. Tax Exemption applies only to federal income tax and not to state income tax or sales tax. Chapters given exempt status by the federal government are usually considered exempt from state income tax, too. To find out what the tax obligation of a 501(c)3 is in your state, contact your state treasurer's office or secretary of state.
3. APHON or any of its chapters is exempt as a 501(c)3. The organization is generally exempt from federal income tax with the exception of Unrelated Business Income Tax (UBIT). Almost the only income in question as UBIT would come from advertising, not vendor displays or funding support. If you have questions regarding UBIT call the APHON staff liaison at 847.375.4724.
4. The IRS makes it possible for a "parent" organization (e.g. APHON) to include its chapters in its exemption, a process known as Group Exemption. The APHON Board has made this option available to chapters. Chapters can file for exemption on their own or through the group process with APHON. If a chapter is exempt as part of the "group," APHON will file its annual IRS tax reports.
5. Chapters that wish to participate in the group exemption process must complete a local chapter information for tax exempt status form and the authorization to be included in group exemption letter form and submit to the APHON office by May 1st during a local chapter's organizational year.

Resources

- Local Chapter Chair
- Local Chapter Vice Chair
- APHON Executive Director
- APHON Director of Finance

APHON will file your annual IRS report, using the information submitted to APHON in the annual report.

Filing Outside APHON's Group Tax Exemption

If a local chapter at anytime wishes to file taxes on their own behalf with the IRS, or has greater than \$25,000, the local chapter will need to send a letter to the APHON national office. The letter should state that the local chapter either wishes to file its own taxes or has assets totaling \$25,000 or more, and will file with the IRS on its own and not under APHON's group

exemptions.

Reasons for Incorporation

There are four reasons for chapters to become incorporated. First, to prevent board members or organizing individuals from being held personally liable (responsible) for torts (law suits) and contractual obligations of the organization. Second, to designate a line of authority and fixed organizational structure. Third, to provide a greater degree of legal certainty. Fourth, to allow for perpetual life of the chapter.

Incorporation Reasons
1. Protection from lawsuits
2. Designate an official organizational structure
3. A degree of legal certainty
4. Allow for perpetual life for the chapter

Chapter Incorporation Requirements

Chapters must incorporate once they're chartered. The liability issue is critical to even the smallest chapter. If the chapter collects dues, sponsors activities, or is involved in contractual arrangements, it is assuming liabilities. There is another advantage to incorporation in those states that have strong not-for-profit corporation acts, such as Illinois. The acts in those states limit the liability of leaders of an association, so that even without liability insurance there is added protection. Chapters do not have to incorporate in the state where the local chapter is located.

Resources

- Local Chapter Chair
- Local Chapter Liaison
- APHON Staff Liaison

Incorporation Process

1. Chapters are required to incorporate in Illinois through the assistance of the national office.
2. APHON staff will send your chapter a pre-completed application form that will require the signature of each current board member. Once returned, APHON will submit the application to the Illinois Secretary of State's office and pay the necessary application fee.
3. Incorporated local chapters will be required to file annual reports with the state in which APHON staff will oversee annually.
4. .

Incorporation Steps

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Application for Organizational Year

**ASSOCIATION OF PEDIATRIC
HEMATOLOGY/ONCOLOGY NURSES**



Application Form to Start Organizational Year

We, whose signatures appear, representing the new APHON chapter, are applying to start our organizational year.

Number of APHON members: _____

Date organized: _____

Name

Name

Office (if applicable)

Office (if applicable)

Date

Date

Please complete the following checklist: ↩

- θ Application (above)
- θ Summary of a minimum of four educational programs
- θ Roster of APHON members
- θ Meeting minutes
- θ Written summary of chapter's history

Σ *This application is due no later than July 1.*

CHAPTER ROSTER

(Name of Chapter)

	Name	RN	Address, City, State, Zip	(This page may be duplicated as needed.)	Member ID#
1					
2					
3					
4					
5					
6					
7					
8					
9					
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11					
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25					

Application for Charter

**ASSOCIATION OF PEDIATRIC
HEMATOLOGY/ONCOLOGY NURSES**



Application Form for Charter

Petition for charter from members of the Association of Pediatric Hematology/Oncology Nurses (APHON) for a chapter to be known as the

_____ Chapter of APHON which it will
operate is _____.

We, whose signatures appear, representing the above-named chapter, agree to abide by the bylaws, policies and procedures of the Association of Pediatric Hematology/Oncology Nurses.

Number of APHON members: _____

Date organized: _____

Name

Name

Office (if applicable)

Office (if applicable)

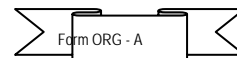
Date

Date

Please complete the following checklist:

- ☐ Application for Charter
- ☐ Activity report
- ☐ Financial report
- ☐ Officers' report
- ☐ Group exemption letters
- ☐ EIN number
- ☐ Roster of APHON members
- ☐ Meeting minutes
- ☐ Written summary of chapter's history

Σ This application is due no later than July 1.

**ASSOCIATION OF PEDIATRIC
HEMATOLOGY/ONCOLOGY NURSES****Local Chapter EIN**

1. Name of chapter: _____
 2. Mailing address: _____
 3. EIN): **00-00000000**
-

6. What is the chapter's income in the current fiscal year?

0 Less than \$25,000

0 More than \$25,000

Treasurer

Date

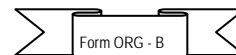
President

Date

For Office Use Only

Date received: _____

**ASSOCIATION OF PEDIATRIC
HEMATOLOGY/ONCOLOGY NURSES**



Authorization to Be Included in Group Exemption Letter

_____, a local chapter of the Association of Pediatric Hematology/Oncology Nurses, hereby authorizes the Association of Pediatric Hematology/Oncology Nurses to include it in the group exemption letter. This authorization is signed by _____, a duly authorized officer of the local chapter. This authorization will continue until the local chapter notifies the Association of Pediatric Hematology/Oncology Nurses in writing that it no longer wishes to be included in the group exemption letter.

Treasurer

Date

President

Date

For Office Use Only

Date received: _____