

Five Steps to Starting an APPA Chapter

By Winnie Kwofie

Chapters are becoming a pivotal means to grow the APPA family and to effectively engage members—a key success metric for the APPA organization. Chapters can serve as an effective means to recruit new members, retain current members, and keep them all engaged and active. Chapters provide opportunities for in-person networking events, meetings and trainings, and other knowledge-sharing and hands-on learning activities requiring limited or no travel and reduced room-and-board costs.

Most important, chapters can help build interprofessional relationships and personalized touchpoints that can serve as professional lifelines for members pursuing their careers. Each member has their own APPA journey to relate, with personal stories on insights and survival skills they've learned, or wisdom they've gained from an encounter with an APPA member.

IT TAKES VOLUNTEERS, TIME, AND EFFORT

Although there are many advantages to forming a chapter, it is by no means an easy task. Added to the excitement, passion, and zeal needed to get it started is the hard work of finding equally passionate and excited members to volunteer their time and effort. The amount of work required varies from chapter to chapter, with some chapters soliciting the services of an attorney and a certified public accountant to complete the entire registration. Such strategy requires financial commitment, but allows the founding members to focus efforts on programs and events for the chapter.

As happened in other chapters, the founding members of BAYAPPA in California volunteered their time and effort to complete the entire process. The challenges included: 1) finding dedicated members to serve in assigned founding board roles, 2) finding time to develop bylaws, 3) filling out all state, federal, and association registration forms, 4) finding reasonably priced legal and/or public accounting services to review all the paperwork

at zero cost, 5) submitting all the paperwork to complete registration, and 6) most important, developing exciting and suitable professional events and programs for members, because such activities are crucial to the long-term survival of the chapter. I strongly recommend that programs and events be developed simultaneously during the registration process, because membership participation and attendance at events, workshops, and other knowledge-sharing and networking programs are key measures of chapter success.

The registration process could be as short as four months, or take as long as two years to final registration once the idea to start a chapter is conceived. There is no need to start from scratch, because existing chapters are willing to provide guidance. My recommendation is to aim for a six-month time frame to keep the momentum going. Two key decisions that should be made quite early in the process include: 1) geographical boundaries for the chapter, and 2) names/acronyms for the chapter. These two decisions are required regardless of whether the registration is done by the chapter or by an outside agency. Setting a geographical boundary for the chapter could be challenging, so it is important to focus on mapping out a boundary that provides the best opportunities for reduced cost and time for in-person knowledge sharing and networking.

THE FIVE KEY STEPS

I have provided five key steps, including some tips from my own experience to assist others interested in forming a chapter:

Step 1—Founding Members

- Passion and zeal are fabulous attributes for founding members; however, it is critical to evaluate the time and commitment needed for the registration process and for program and event planning. The average number of founding members required for the board is five. Depending

on the level of commitment and responsibility, each member has to commit a minimum of ten hours toward the development and review of all documents.

Of course, the time commitment required will depend on the chapter's strategy for registration. One member should serve as the gatekeeper for all documents and correspondence to and from the proposed chapter board. Of the five members, the chapter should include one representative from the regional board and one representative from the regional business partners' pool. These representatives can provide the chapter with the benefits of knowledge transfer from board governance, chapter alignment with the regional board, and APPA and business-partner relations and protocols.

Step 2—Develop a Preliminary Outline to Validate the Need for a Chapter

When it is determined that a state or local area could benefit from a chapter, it is beneficial to develop a preliminary outline with dates and timelines to explore and validate the need for a chapter.

- Select a boundary that provides optimal opportunities for in-person networking, training, and knowledge exchange. Identify possible locations for events and networking with optimal proximity to targeted institutions within the boundaries. Identify possible obstacles such as long travel time and need for room and board, and how these could be minimized to encourage participation. The rule of thumb is to set the boundary to maximize transportation options for members so they can use part of their regular work schedule to attend events and also to travel back home after the events.
- Research and select names and acronyms that will help to brand the chapter and to align it with the geographical area. The chapter should verify from the Secretary of State's online database in their state to ensure the name is not already taken. The name search can be included in the services of the agency hired to complete the registration. Also check the list of existing APPA chapter names and acronyms to avoid duplication.
- If the need for a chapter is validated and the founding members agree to set one up, roles and responsibilities should be assigned with timelines for reporting progress.

Step 3—Seek Approval from the Regional Board and APPA

- The chapter would need to seek approval from the regional board and APPA. This approval from the regional board ensures the commitment of the regional board and APPA to support the chapter's development and success. APPA provides a memorandum of understanding (MOU) between itself, the regional board, and the chapter.

Step 4—Bylaws Development, Registration, and Documentation

- There is no need to reinvent the wheel. Members interested in setting up a chapter could start with the bylaws from either their regional board, from APPA, or from other existing chapters and revise the sections to meet their chapter requirements. The two key components of the bylaws are the board positions and voting procedures, which are different for each chapter or regional board. It is important to define the chapter board positions and their assigned roles, responsibilities, and voting requirements.
- Request a Federal Identification Number (EIN) at <https://www.irs.gov>.
- Request an MOU between APPA, the regional board, and the chapter
 - State registration forms
 - File the articles of incorporation.
 - File the initial registration form, the state Attorney General's Registry of Charitable Trusts.
 - File the Statement of Information with the Secretary of State.
 - Tax-exempt status—APPA will file the tax-exemption paperwork on behalf of the chapter after the MOU is signed by the chapter founding president and the regional board president.
- Find a legal and/or public accounting service to review all documents. This is an important service and could be expensive even for a nonprofit entity. I recommend you start with your institution's legal counsel or solicit referrals.

Step 5—Additional Tasks to Consider

- Open a business bank account: Choose the same bank as the regional board if fund transfer opportunities would be considered as part of the chapter operations.
- Request seed funds from your regional APPA, or from APPA if this is critical for the first event planning.

- Host a celebration reception and/or first event. It is easy to take a deep breath and relax after the registration process, but that may diminish your momentum in becoming a functional chapter. Try to have an event in mind while in the planning stages, at a minimum a reception to inaugurate the chapter and to network with members.
- Schedule monthly phone or in-person board meetings, preferably monthly phone meetings for more convenience.

These steps are my general recommendations to get your chapter started; however, they should not be considered as covering all aspects of the process or as the only strategy for registration. Please do remember that the process varies from state to state and even within counties and cities. Finally, I would like to emphasize that the APPA staff will be glad to provide guidance and support on the entire process. ☺

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BAYAPPA

BAYAPPA was established in January 2015, and there was an engaging and participatory process to finalize the name and the boundaries. We hosted our first educational program in September 2015, with over 40 participants in attendance all the way from Southern California to Nevada. The participants were very eager for more knowledge-sharing events.



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