

AMSN Chapter Toolkit



ACADEMY OF MEDICAL-SURGICAL NURSES

compassion • commitment • connection

Academy of Medical-Surgical Nurses (AMSN)

East Holly Avenue Box 56

Pitman, NJ 08071

(866)-877-2676

amsn@amsn.org

chapters@amsn.org

www.amsn.org

Introduction

Let us help you establish an AMSN Chapter – from Start to Finish!

The Academy of Medical-Surgical Nurses (AMSN) Chapters are a vital component of AMSN.

Chapters are a way for AMSN members to connect with each other to share ideas and to raise awareness of the medical-surgical specialty.

Thank you for your commitment to AMSN and your hard work to help local medical-surgical nurses develop personally and professionally, advocate for the specialty of medical-surgical nursing and connect with other nurses who share their compassion and commitment.

In this comprehensive Chapter Toolkit, you'll find all the information you need to create, build and maintain a successful AMSN Chapter.

Chapter 1: Getting Started

Chapter 2: Sustaining Your Chapter

Chapter 3: Dollars and Sense

Chapter 4: Dissolution



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Chapter 1: Getting Started

We are delighted you are interested in learning how to start an Academy of Medical-Surgical Nurses (AMSN) Chapter!

Chapters are a way for AMSN members to connect with each other to share ideas and to raise awareness of the medical-surgical nursing specialty.

We have assembled the necessary tools in *logical order* to help you in establishing a chapter.

Remember! Only AMSN members can start and join AMSN chapters.

Get Ready in Advance

Starting a chapter has several steps and the process will go much smoother when you are prepared.

The Organizational Meeting Topics is a list of helpful and informative suggested items and topics to discuss during your first organizational meetings.

We suggest that your first initial organizational meeting include at least 5 AMSN members who are interested and committed to the growth and development of a chapter.

Once you've decided to start an AMSN chapter, you will need to choose chapter officers and a primary contact who can serve for a minimum of two years to provide continuity of leadership as you get your chapter started.

Chapter Officer positions include: President, Secretary, Treasurer, Member, President-Elect, or Co-Chair.

Have all your Chapter Officer positions in place? Ready to start your chapter?

Email Chapters@AMSN.org to receive the Chapter Charter Petition form and get started!

Congrats!

Once your Chapter Charter is approved, the National Office will send you AMSN recruiting materials (digital), information on how to recruit members to your new



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chapter, a \$75 Visa Gift Card to help with initial expenses, and the annual report and achievement report that must be submitted to the National Office. You can find the annual report and achievement report for 2020 on the next page.



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2020 Annual Report & Chapter Achievement Report

Send to the National Office by June 30, 2020. Please submit via Email.

| Chapter Information | | Chapter #: |
|--|--|------------|
| Chapter Name | | |
| Cities, State served by Chapter | | |
| Chapter Charter Date | | |
| Annual Dues of Chapter | | |
| Qty Chapter Members (Minimum of 5 required) | | |



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Chapter Officers July 2019 – June 2020

| | |
|------------------|--|
| PRESIDENT - Name | |
| Employer | |
| City, State | |
| Preferred Email | |



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| | |
|--|--|
| PRESIDENT ELECT-Name | |
| Employer | |
| City, State | |
| Preferred Email | |
| SECRETARY - Name | |
| Employer | |
| City, State | |
| Preferred Email | |
| TREASURER - Name | |
| Employer | |
| City, State | |
| Preferred Email | |
| Primary Chapter Contact and email address for AMSN website | |

Officers for Next Year

| | |
|--|--------------|
| Will you elect new officers during the 2020-2021 year? | Yes___ No___ |
| If yes, what month will you have elections? | |
| If yes, in what month will their term of office begin? | |



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| | |
|---|--|
| If yes, how long is their term of office – 1 yr, 2 yrs? | |
| <i>Please remember to turn in a new chapter profile as soon as they take office.</i> | |
| Chapter Committees/Chairs for July 2019 – June 2020 | |
| Committee Name | |
| Name of Chair/Coordinator | |
| Preferred Email | |
| Committee Name | |
| Name of Chair/Coordinator | |
| Preferred Email | |
| Committee Name | |
| Name of Chair/Coordinator | |
| Preferred Email | |

| Chapter Accounts | |
|--|--|
| Type of Account (checking or savings) | |
| Account Number | |
| Name and Address of Bank | |
| Telephone # of Bank | |
| Names and Chapter Positions of people with authority to sign on this account | |



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| | |
|---|--|
| Type of Account (checking or savings) | |
| Account Number | |
| Name and Address of Bank | |
| Telephone # of Bank | |
| Names and Chapter Positions of people with authority to Sign on this account | |
| Chapter Financial Report 2019-2020 | |
| Total Balance – all accounts - July 1, 2019 | |
| Projected Ending Balance – all accounts - June 30, 2020 | |

| | | |
|---|-----------------|--------------------------|
| Business Meetings July 2019– June 2020 | | |
| Minimum of 3 required per year. | | |
| Agendas and minutes no longer requested. | | |
| Date | Location | Qty Attending |
| | | |



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| | | |
|--|--|--|
| | | |
|--|--|--|

Educational Activities July 2019 – June 2020

Minimum of 4 activities or 4 hours required per year (CE not required)

| Date | Location | Title | Speaker(s) | Program Length Hours | Qty Attending |
|------|----------|-------|------------|----------------------|---------------|
| | | | | | |



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Chapter Achievement Report

July 2019 - June 2020

Please indicate if the activity or event is New (N) or Maintained (M).

| Recruitment and Retention Activities | N or M |
|--|--------------|
| <p style="text-align: center;">How did your chapter recruit and retain chapter members?</p> <p>Qty Members Last Year: _____ Qty Members This Year: _____</p> <p>Chapter Activities:</p> | |

| Collaboration with other Professional Organizations | N or M |
|---|--------------|
| <p style="text-align: center;">How did your chapter work with other professional organizations?</p> | |



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| Community Activities/Services | | | | N or M |
|--|------|---------------------------|----------------------------------|--------------|
| How did your chapter serve your local community? | | | | |
| List with the following information below. To be considered a chapter event, at least 4 chapter members need to participate. | | | | |
| Community Activity/Service Name | Date | Qty Mbrs Participating | If a walk or run, Total Miles | N or M |
| | | | | |
| | | | | |
| | | | | |
| | | | | |



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| <h2 style="text-align: center;">Political /Legislative Activities</h2> <p style="text-align: center;">How was your chapter involved in political and legislative activities at the local, state, or national level?</p> | N or M |
|---|--------------|
| | |

| <h2 style="text-align: center;">Marketing Activities</h2> <p style="text-align: center;">How did your chapter promote AMSN or med-surg nursing certification in your community?</p> | N or M |
|---|--------------|
| | |



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| <h2 style="text-align: center;">Participation at National Level</h2> <p style="text-align: center;">How did your chapter participate in the activities of the national organization?</p> | N or M |
|--|--------------|
| | |

| <h2 style="text-align: center;">Additional Activities</h2> <p style="text-align: center;">Are there other activities for which your chapter might be recognized?</p> | N or M |
|--|--------------|
| | |



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Performance of 2019-2020 Goals

(How did you do at achieving the goals that were set for the chapter last year?)

For example, Goal: Recruit 10 new members – Achievement: Recruited 8 new members.)

Chapter Goals for the 2020– 2021 Year

(focus on about 3 per year – specific and quantifiable)

This report is respectfully submitted to the national office as a detailed summary of the activities and accomplishments of this AMSN Chapter for the year **July 1, 2019 - June 30, 2020**. Through our hard work, we have enhanced the mission of the Academy of Medical-Surgical Nurses to promote excellence in medical-surgical nursing.



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| | |
|----------------------------------|--|
| Name of Person Submitting Report | |
| Chapter Position | |
| Date | |

This completes the Chapter Annual Report & Achievement Report

Please send to the AMSN national office via email to:

chapters@amsn.org

If annual report + achievement report is not received by September 1st, 2020, National Office may remove Chapter from Active Chapter Listings on the amsn.org website.



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Chapter 2: Sustaining Your Chapter

There are only three requirements for keeping your chapter going:

1. Have a minimum of five AMSN members
2. Hold 4 events a year (social, educational, charitable, etc)
3. Complete a yearly status report and submit to the National Office.

If you need to update Chapter Officer positions, primary contact, or anything else, you can do so by emailing the National Office at Chapters@AMSN.org.

But what's next? How do you get members to join your chapter?

Due to increased privacy laws domestically and internationally, AMSN can no longer release the member list upon request to chapter officers. However, the National Office can send a recruiting email on your behalf to members in your area.

Not sure how to write a recruiting email? That's okay! The National Office staff will help. Email chapters@AMSN.org and the National Office Staff will help write the email and design it, and send it to you for final approval.

AMSN wants to grow its chapters and support its existing chapters. Each chapter can send two recruiting emails a year through the National Office.

How do I advertise my chapter events?

By emailing chapters@amsn.org! The National Office will post your event on the website and include it in any upcoming newsletters that are appropriate for that event. In order to list your event, please send the following information:

Chapter Name:

Chapter Location:

Chapter Contact:

Event Name:

Event Date:

Event Time:

Event Location:

Event Description:

CNEs Associated with Event:



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I want to use AMSN's logo and other materials!

AMSN rebranded with a new logo and new recruiting materials in the summer of 2019! And as part of our initiative to watch our environmental footprint, AMSN is providing our chapters with the digital assets for recruiting materials. Chapters can print as many of the postcards, flyers, posters, and other materials as they need for their events. Additionally, Chapters can use AMSN's logo on their website and social media, as long as they are in good standing with AMSN.

AMSN's logo and materials provided to Chapters cannot be changed in *any* way, including size, formatting, or color.

If you have questions about this, please email the National Office at chapters@amsn.org



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Chapter 3: Dollars and Sense

It's important that AMSN Chapters follow all applicable financial rules for Chapters. The following pages are financial guidelines provided for Chapters. If you have questions, please reach out to the National Office at chapters@amsn.org

Chapter Financial Management

Financial Facts

- The Chapter Officers (Officers) should be involved in setting financial goals for the Chapter and in preparing and approving the budget.
- The Officers should review the budget to ensure that the projected income (revenues) and expenses are realistic.
- The Treasurer is responsible for making sure that financial records are accurate and maintained.
- Each established Chapter should have a Federal Employer Identification Number (EIN), sometimes called a Tax ID. The EIN is a registration number with the Internal Revenue Service. Learn all about it, and apply online free at irs.gov.
- It is not mandatory for chapters to apply for tax-exempt recognition. Chapters may actually earn up to \$25,000 gross revenue per year without filing a tax return and paying taxes. However, when chapter funds exceed this amount, filing a tax return will be the responsibility of the chapter.
- Chapters cannot share the national organization's tax-exempt status. Each local chapter must apply for individual recognition of exemption from income tax.

Financial Records

The treasury files should contain the following items:

- Copy of the approved budget
- Receipt book to acknowledge money received
- Checkbook to disburse funds as authorized
- Treasurer's accounting books (e.g., bank statements, deposit slips, cancelled checks)
- Up-to-date roster of members
- Tax records (if any)
- Federal EIN
- Letter from IRS with determination of tax exempt status (if applicable)



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- Fundraising Records
- Inventory of goods in stock

Tax records, your EIN, and letters from the IRS should be kept in your files indefinitely. Financial records also should be kept indefinitely. If the Treasurer's report is included in minutes or newsletter, these items are in the permanent files and this will suffice. Separate financial records, bank statements, and annual reports should be kept with the Treasurer's files for three years.

These records must be shared with the National Office upon request.

W9 Forms

When a vendor donates something (money, good, food, etc) to your Chapter, they will ask you to fill out a W9 form. This form is filled out by the Chapter and allows the vendor to take the donation as a business expense. The National Office recommends that you fill out a new one every year and have it saved for your convenience.

Some frequently asked questions about the W9 form include what each line corresponds to with regards to the Chapter. Here are some easy answers.

- **Name:** Name of the Chapter
- **Business Name:** Don't need to fill out
- **Other:** Professional Association
- **Exempt Payee:** Do not check
- **Address:** Typically the Treasurer's or your PO Box
- **List Account Number:** Do not fill out
- **Social Security Number:** Do not fill out
- **Employer Identification Number:** Your Chapter EIN (Tax ID) number



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Chapter 4: Dissolution

Sometimes Chapters need to close for any number of reasons. In that case, AMSN requires Chapter officers to contact AMSN and to fill out the Chapter Dissolution agreement attached on the following page. If you have any questions, please reach out to chapters@amsn.org



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AMSUN Chapter Dissolution Agreement

If an AMSUN Chapter is dissolving, the Primary Chapter Contact will sign this Agreement. By signing this Agreement, the chapter states that it wishes to dissolve its chapter, and all financial obligations have been satisfied.

The chapter will mail this agreement along with a check for the remainder of its unused funds (if applicable) to the Academy of Medical Surgical Nurses, PO Box 56, Pitman, NJ 08071.

Chapter Name and Number (Please Print)

Primary Chapter Contact Name (Please Print)

Primary Chapter Contact Signature

Date



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