



# CHAPTER CRITICAL ELEMENTS

## The Relationship between CHADD Chapters & National

CHADD's national office manages the legal and fiscal responsibilities of operating as a non-profit organization in the US. CHADD local chapters collect and disburse their own funds, except for CHADD membership dues, which are processed by the national office. A portion of membership dues is shared with each chapter on a quarterly basis.

### CHADD'S RELATIONSHIP TO THE IRS

501(c)(3) status

CHADD is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code of 1954 since the association is organized and operates for educational purposes. CHADD has a federal tax-exempt ID number (59-2817697).

CHADD is required to send an annual update to the IRS regarding chapter income, expenses and the number of volunteers working for CHADD each year. Although CHADD is not required to file income tax returns, CHADD must complete the annual informational return, Form 990. In order for CHADD to fulfill its obligation to the IRS, every chapter must submit financial activity and volunteer information to the national office. In addition, any volunteers who are working with a chapter on a regular basis must complete conflict of interest and confidentiality agreements, and they must be shared with the national office. The national office tracks volunteers, communicates with them via email, and reports to the IRS by April of each year.

Any organization which fails to file a Form 990 return with the IRS by the due date can be charged with a penalty. It is therefore essential that chapters submit their financial reports in a timely manner. A chapter's treasurer and coordinator provide authorization to CHADD to include its financial activities to the IRS. If a chapter is not compliant with financial reports for 12 months, the chapter will be changed from chapter status to satellite status.

The CHADD national office sends reminders on an ongoing basis to chapter coordinators about financial requirements, and notifies chapters when they are behind on reporting requirements. Satellites are still local CHADD affiliates, but they do not have boards, bank accounts, submit minutes or financial reports, and their annual income is capped at \$599.00/year. Checks from the national office are written in the coordinator's name, and not to the chapter.



# CHAPTER CRITICAL ELEMENTS

## I. CHAPTER ADVISORY BOARDS

| REQUIRED   | RECOMMENDED   |
|--|---|
| <ul style="list-style-type: none"> <li>• Each chapter will have an Advisory Board to include at least a Coordinator, a Treasurer, and one other board member.</li> <li>• All advisory board members must be and remain CHADD members in good standing.</li> <li>• All Advisory Board members must sign conflict of interest and confidentiality agreements.</li> <li>• Coordinators will sign a Chapter Agreement when they take office, and whenever requirements are revised.</li> <li>• Advisory Board members will be elected or appointed annually by 6/30. Advisory Board composition should be reported to the national office by 7/31.</li> <li>• Working email addresses and a phone numbers (with voice mail) for the Coordinator and Treasurer will be made available to the national office for inclusion on appropriate rosters.</li> </ul> | <ul style="list-style-type: none"> <li>• We suggest that Chapters utilize “Co-coordinator” or “Coordinator-Elect” positions – for ensuring long-term sustainability of the group.</li> <li>• Some chapters utilize a “Secretary” in addition to the Coordinator and Treasurer as an officer for the Advisory Board.</li> <li>• The Chapter Advisory Board may also include a representative from each chapter branch.</li> <li>• The Advisory Board composition should be announced to the local membership by 7/31, by posting results on the chapter’s website, announcing them at a chapter meeting, and/or sending an e-mail to local members.</li> </ul> |



# CHAPTER CRITICAL ELEMENTS

## II. MEETINGS & PROGRAMMING

| REQUIRED   | RECOMMENDED  |
|--|--|
| <ul style="list-style-type: none"> <li>• Chapters must demonstrate programming that meets CHADD's mission: <b><i>“CHADD improves the lives of people affected by ADHD.”</i></b></li> <li>• Chapters and branches are required to host at least four meetings each year.</li> <li>• Chapters and branches must provide sign-in sheets at each meeting, designating members, non-members and 1<sup>st</sup> time attendees.</li> <li>• 1<sup>st</sup> Time Meeting attendees should be identified on the attendance form, which includes the CHADD Disclaimer:<br/><br/><i>“CHADD does not endorse any product, service, publication, medication or treatment.”</i></li> </ul> | <ul style="list-style-type: none"> <li>• Chapters offering support groups should hold monthly meetings.</li> <li>• At least one meeting each year should focus on issues related to adults with ADHD.</li> <li>• In addition to support group meetings, Guest Speaker presentations are encouraged.</li> <li>• Chapters are encouraged to use the information provided on the sign-in sheets to promote future chapter and branch events.</li> <li>• New attendees should be recruited for CHADD membership and invite attendees to have a more vested interest in your chapter. A statement could be made at the beginning of each meeting:<br/><br/><i>“We request a \$5 donation from non-members to support our chapter and CHADD’s mission of providing support to improve the lives of those affected by ADHD. If you decide to join CHADD by the end of this meeting, we will return your \$5 and provide you with our chapter welcome packet as a thank you for supporting CHADD.”</i><br/><br/>The welcome packet can consist of past <b>Attention</b> magazines and any other handouts the chapter would like to include.</li> </ul> |



# CHAPTER CRITICAL ELEMENTS

## III. REPORTING & PAPER WORK

| REQUIRED  | RECOMMENDED   |
|---|---|
| <ul style="list-style-type: none"> <li>• Chapters must submit <b>quarterly financial reports</b> to the national office, 30 days after each quarter ends, by the following dates: 10/31, 1/31, 4/30, and 7/31.</li> <li>• A copy of financial reports must be retained by the chapter for three years. (See <b>Financial Accountability Policy</b> statement for full details.)</li> <li>• Any time there is a change in Advisory Board members or officers, signed conflict of interest and confidentiality forms, and bank signature forms, should be submitted to the national office.</li> <li>• Chapters are responsible for ensuring the compliance of any branches, and assume all financial reporting responsibility for their branches.</li> <li>• On a <i>quarterly</i> basis, chapters must report any participation in lobbying and legislative activity to National, including any funds paid by the chapter or its branches. <b><u>This is an IRS requirement.</u></b></li> <li>• Chapters will send CHADD a signed, voided, bank check so that it may be maintained on file at National. This must be updated every time there are signatory changes.</li> </ul> | <ul style="list-style-type: none"> <li>• It is recommended that chapters take <u>minutes</u> at all Advisory Board meetings. A <u>meeting minutes template</u> is available online under the <i>Volunteer Leader Center</i>.</li> </ul> |



# CHAPTER CRITICAL ELEMENTS

## III. REPORTING & PAPER WORK (Continued)

| REQUIRED  | RECOMMENDED  |
|---|--|
| <ul style="list-style-type: none"> <li>• Chapter Coordinators must prepare an <b>Annual Progress Report</b>, to be submitted to the national CHADD office by JULY 31<sup>st</sup> each year (see SAMPLE Chapter Annual Progress Report form online under the <i>Volunteer Leader Center</i>).</li> <li>• Copies of Attendee Sign-in Sheets (described above under Meetings) must be retained by the chapter for three years, with a copy mailed to CHADD national <i>only if requested</i>.</li> <li>• When meetings are held by the chapter and its branches, information on 1<sup>st</sup> Time Attendees from the attendance log must be emailed to <a href="mailto:affiliate-services@chadd.org">affiliate-services@chadd.org</a>, for import into the national database. This should be done after every meeting. Attendance Log template can be found in the <i>Volunteer Leader Center</i>.</li> </ul> | <ul style="list-style-type: none"> <li>• It is recommended that Chapters use the <b>SAMPLE Annual Progress Report Form</b> (found online under <i>Volunteer Leader Center</i>.) However, other report formats will be accepted (for example, if you already create an Annual Report for your board, donors, members or funders) as long as it includes the following information:             <ul style="list-style-type: none"> <li>✓ <i>number of board meetings held past year</i></li> <li>✓ <i>summary of board minutes</i></li> <li>✓ <i>number of chapter and branch meetings and average attendance</i></li> <li>✓ <i>checking account balance as of June 30<sup>th</sup></i></li> <li>✓ <i>inventory of chapter and branch assets as of June 30<sup>th</sup></i></li> <li>✓ <i>summary of past year strengths and weaknesses</i></li> <li>✓ <i>goals for the coming year</i></li> <li>✓ <i>officers (with contact info) and other Advisory Board members for the new year</i></li> <li>✓ <i>How national could provide greater support for your chapter.</i></li> </ul> </li> </ul> |



# CHAPTER CRITICAL ELEMENTS

## IV. COMMUNICATIONS & PUBLIC RELATIONS

| REQUIRED  | RECOMMENDED   |
|---|---|
| <ul style="list-style-type: none"> <li>Each chapter will regularly respond to the CHADD provided <u>"chadd.net" email account.</u></li> </ul> <p>Emails may be from members of the general public, CHADD chapters/members, national staff, information requests, etc.</p> | <ul style="list-style-type: none"> <li>It is recommended that the chapter have a web site and "list serve" to maintain communication with their members and potential members.</li> <li>Chapters may share a "regional" website with other chapters in their area.</li> <li>Chapters should have a full schedule of meetings listed on the chapter's website (one year is recommended).</li> <li>It is suggested that Chapters hold periodic fundraising events to support the chapter, and one fundraiser a year to support the national organization.</li> <li>National will provide a detailed plan, a "fundraiser in a box," for chapters to consider offering at a time convenient for the chapter.</li> </ul> |