AMERICAN MEDICAL WRITERS ASSOCIATION (AMWA)
CHAPTER HANDBOOK

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INTRODUCTION

This Chapter Handbook is designed to provide chapter leaders with important information about the purposes, roles, and responsibilities of chapters. In addition, the Chapter Leader Toolkit has been created to offer suggestions to support volunteers in the development and management of a healthy and productive chapter.

Chapters are a great strength of the organization and allow AMWA members to develop personal relationships in their regional area, attend local educational and networking events, and pursue common interests of the group. The AMWA officers and headquarters (HQ) staff greatly appreciate the time, energy, and commitment chapter leaders offer the organization. Volunteering as a chapter leader should be a rewarding and fulfilling experience. Supporting chapters through chapter leadership and local volunteering opportunities contributes greatly to the year-round vibrancy of the organization.

In addition to the handbook and toolkit, the AMWA Executive Director and HQ staff can answer many questions that chapter officers may have. Chapter leaders are encouraged to communicate regularly with AMWA staff in support of their chapters’ growth and development. Positive working relationships between staff and chapter leaders are in the best interest of the organization and ultimately our members. Please find staff contact information on the AMWA website.

AMWA Headquarters’ office hours are Monday–Friday, 9:00 AM–5:00 PM (Eastern Time). Address: 30 West Gude Drive, Suite 525, Rockville, MD 20850; phone: 240-238-0940; fax: (301) 294-9006; general email: amwa@amwa.org; URL: www.amwa.org.

ABOUT AMWA

The American Medical Writers Association (AMWA), founded in 1940, is the leading professional organization for writers, editors, and other communicators of medical information. The association offers a highly regarded continuing education program, including distance learning and a certificate program; an Annual Conference featuring prominent speakers, discussion sessions, and workshops; networking opportunities through the Annual Conference and chapter activities; job services, including Jobs Online and a Freelance Directory; a website with comprehensive information, member discount opportunities, and online community forums; and the AMWA Journal, an indexed, peer-reviewed publication.

Mission

AMWA's mission is to promote excellence in medical communication and to provide educational resources in support of that goal.

Membership

AMWA has nearly 5,000 members in the United States, Canada, and 30 other countries. Members work for pharmaceutical companies, universities and medical schools, hospitals, nonprofit organizations, government agencies, journals, and many other businesses and organizations. Many work as freelance writers and editors. Membership in AMWA is open to anyone interested in any aspect of medical communication. Student membership is also available. If you work in the field of medical communication, you belong in AMWA. The association's programs enhance the knowledge and skills of all medical writers and communicators. Affiliation with a chapter is an added benefit of AMWA membership at no additional cost.
Organization and Governance Structure

AMWA is a nonprofit organization that is incorporated by the State of Illinois and recognized by the IRS as 501(c)(3) organization. AMWA staff is headquartered in Rockville, MD; AMWA staff are association and nonprofit management professionals led by an executive director and support AMWA’s activities and operations. The executive director is hired by and is responsible to AMWA’s officers. AMWA is governed by a Board of Directors (BOD) that is composed of an Executive Committee (EC) and representatives from its 19 US and Canadian chapters. Membership in AMWA is a requirement for all volunteer leadership positions.

- Board of Directors: Consists of officers, department administrators, and chapter delegates. Formulates policies and programs of AMWA in accordance with its objectives.
- Executive Committee: Consists of officers and department administrators. Administers and executes the policies of AMWA.
- Officers: Consists of president, president-elect, secretary, treasurer, and immediate past president. Meets with the executive director to review the plans, resources, and accomplishments of the staff.

Throughout this handbook, the term AMWA is used to refer to the entire organization as defined above. The purpose of this handbook is to provide guidance to chapters, a critical component of the overall organization’s structure and success.

- Chapters: Regional subdivisions of AMWA that provide local educational programs and networking opportunities to members; chapters maintain their own separate bank accounts and financial records and are governed by their own board of directors or executive committee according to their respective bylaws.

PURPOSE OF CHAPTERS

The AMWA bylaws outline the procedures for chapter creation, mergers, or dissolution. Regarding the rationale for having chapters, Article VII—CHAPTERS, states "Because it is desirable that every member be associated with a chapter of AMWA and participate in its activities, AMWA encourages the formation of chapters."

The purpose of chapters is similar to that of the organization’s mission, ie, to promote excellence in medical communication and to provide educational resources in support of that goal. Chapters are organized by geographic location to serve AMWA members by providing various educational, networking, leadership, and social opportunities on the local level.
CURRENT CHAPTERS

AMWA currently has 19 active chapters and places AMWA members within the United States and Canada into a chapter. Members outside of the United States and Canada are considered "International" and do not have a formal chapter affiliation. There are no separate fees for chapter membership. Chapter membership is included as a member benefit with payment of AMWA membership dues. New members are required to select a chapter during the AMWA membership application process. Members are encouraged to select a chapter based upon their geographic region, but can choose any chapter. Only one chapter affiliation per member is allowed.

CHAPTER RESPONSIBILITIES TO AMWA

The AMWA bylaws - Article VII offers the following as chapter responsibilities:

- Chapter bylaws must be approved by the AMWA Board of Directors (BOD).
- Each chapter has a president, a president-elect, a secretary-treasurer (or a secretary and a treasurer), and such additional officers as it may choose to have.
- Chapters cannot hold a meeting* within 30 days of the AMWA Annual Conference without approval by the AMWA BOD.
- Chapter officers may use the funds remitted by AMWA only for fully approved chapter purposes.
- Chapters must accept the right of the AMWA BOD to change the geographic boundaries of any chapter.
- At the close of the fiscal year, each chapter shall file an annual report of its income and disbursements, a balance sheet of its financial condition, and an estimated operating and program budget for the ensuing fiscal year. Such statements shall be filed with the treasurer of AMWA on or before August 1** of each year.

*While the AMWA bylaws use the term “meetings,” in practice this refers to a chapter conference. Chapters are able to host chapter board meetings, networking events, and other activities without being considered in violation of this bylaw.

**While the AMWA bylaws require an August 1 date for submission of financial reports, in practice the actual deadline can change annually based upon the schedule for the Fall AMWA BOD meeting. A notice to chapter leaders with the modified deadline is communicated before August 1 of each year.

In addition to what is outlined in the bylaws, chapters are also required to:

- Be represented at all AMWA BOD meetings.
- Submit reports* for the Spring and Fall AMWA BOD meeting using the approved chapter report templates to detail activities.
- Provide contact information for current chapter officers as soon as they are appointed.

*In order for chapters to receive their dues rebate allocation twice each year, the chapter reports (including required financial information) must be submitted to AMWA headquarters.

In Article IV—BOARD OF DIRECTORS (BOD) AND EXECUTIVE COMMITTEE of the AMWA bylaws, the BOD is defined. This includes reference to the important role of the chapter delegate in the governance structure of the organization:
• One delegate is elected or appointed by each chapter.
• A chapter with 400 or more members may have a second delegate.
• Chapter delegates may hold office in their chapters.
• Delegates assume their official duties at the first meeting of the AMWA BOD following the annual business meeting of AMWA and serve until their successors are designated.

AMWA SERVICES TO CHAPTERS AND CHAPTER LEADERS

Article VII of the AMWA bylaws provides information as to the responsibility of the AMWA organization to chapters. AMWA HQ must:

• Promptly inform each chapter of new AMWA members in its area
• Remit a portion of the annual AMWA dues paid by each active member to the treasurer (or secretary-treasurer) of the chapter semiannually

In addition to the bylaw requirements, AMWA HQ also:

• Maintains HQ membership database and tracks chapter affiliation in member records
• Collects and processes membership payments
• Oversees and implements renewal communications
• Sends member lists to chapter leaders bi-monthly (full member list with expiration date, new members, and recently dropped members)
• Maintains the AMWA website and updates the chapter leadership and chapter conference information webpages
• Offers chapter leadership events and training materials
• Hosts monthly chapter leader teleconference to support chapter leader networking and information-sharing
• Provides a chapter leader forum to support direct chapter leader to chapter leader discussion
• Provides support for and promotion of chapter conferences
• Manages arrangements, gathers reports, and sends communications for AMWA BOD meetings
• Coordinates a chapter fund for chapters needing assistance to send delegates to the AMWA BOD meetings

All AMWA member benefits are extended to every chapter member as part of the AMWA-to-Chapter relationship.

CHAPTER RESPONSIBILITIES AS AN INDEPENDENT ORGANIZATION

• Maintain and adhere to chapter bylaws
• Ensure volunteer leadership in all chapter officer positions
• Create separate bank account and obtain Tax Identification Number
• Create and maintain incorporation status (state level)
• File required tax and legal documents as appropriate
• If a chapter has obtained recognition by the IRS for 501(c)(3) or 501(c)(6) status, meet and maintain all related filing and reporting requirements
CHAPTER RESPONSIBILITIES TO CHAPTER MEMBERS

- Maintain a chapter website
- Provide contact information for chapter leaders to chapter members
- Send regular communications to chapter members about chapter activities
- Answer questions from chapter members and potential members
- Host activities and events to support chapter networking and engagement
- Host conferences or other events to support local AMWA workshop or education opportunities

CHAPTER SERVICES

AMWA encourages chapters to develop special services for their members. These services are not assigned to any one officer; the chapter president, chapter BOD, or chapter EC should determine who will best oversee the activity. The following are examples of services offered by some of the chapters:

- Providing educational programming
- Professional skill development and support
- Offering volunteer opportunities to participate in chapter activities
- Networking opportunities
- Building the chapter community
- Support group for freelance medical writers
- Connecting members to job opportunities
- Chapter membership survey to determine members’ preferences for meeting locations and formats, as well as topics for program speakers and panelists to discuss
- Scholarship with a monetary award to defray expenses such as annual membership dues, registration, or travel expenses for chapter conference, or some combination thereof

CHAPTER LIFECYCLE

Forming a New Chapter

Any group of at least 25 AMWA members who share a geographic area can petition the AMWA Executive Committee to form a new chapter. The procedure for forming a new AMWA chapter is described in detail in Article VII (Chapters) of the AMWA bylaws (see the second-to-last paragraph of the Introduction on page 1).

The AMWA bylaws do not provide specific guidance regarding the legal and tax implications for chapters as independent organizations. The following documents should either be on file with existing chapters or should be developed as part of the creation of a new chapter:

- Bylaws
- Articles of Organization/Incorporation
- EIN
- IRS 990 or 990 postcard
- Financial reports
- Chapter reports
**Merging Chapters**

Chapters that have experienced significant declines in membership or in volunteers to lead the chapter may wish to merge with one or more adjacent chapters. Per the AMWA bylaws, the creation of a new chapter by merging two or more existing chapters must follow the same procedure used to create any new chapter (explained in Article VII of the bylaws), save that at least 25 or 50% of the voting members, including all the elected officers, from each chapter must sign the request to form a new chapter.

**Dissolution of Chapters**

There are two main ways that a chapter might dissolve. First, the AMWA bylaws clearly state "Chapters retain their charters at the discretion of the Board of Directors and shall conduct their affairs in accordance with the Constitution and Bylaws of AMWA." Therefore, the BOD can take action to revoke chapter status.

Or, chapters each should have their own dissolution clause clearly defined in their bylaws. Each chapter would follow their own policies and procedures with regards to the dissolution of the chapter.

**Change of Chapter Bylaws**

To change its bylaws, a chapter must submit the changes in writing to AMWA headquarters; specifically, the chapter must send a copy of its bylaws with the proposed changes marked (either with the Track Changes function in Microsoft Word or with underlining and strikethrough). It is recommended that the AMWA Constitution & Bylaws committee review the suggested changes and provide feedback. The final changes will be presented to the AMWA BOD at its next regular meeting. Any change in the bylaws of a chapter becomes effective only after approval by the AMWA BOD. After being notified that the changes have been approved, the chapter should then provide headquarters with a new electronic version of its bylaws, which should include the date of their approval by the AMWA BOD at the bottom.

**CHAPTER LEADERSHIP ROLES AND TASKS**

- Providing vision and strategic direction for chapter development
- Maintaining chapter activities and managing the status quo
- Developing and implementing new chapter activities
- Communicating chapter information with members
- Delegating tasks to chapter committees or work groups as needed
- Identifying future leaders
- Training of and transition to new leaders
- Working with AMWA HQ and the AMWA Chapter Relations Administrator
- Serving as a chapter delegate or assigning a chapter delegate to the AMWA BOD
- Creating and submitting chapter and financial reports
- Following official AMWA policies and procedures as outlined in the Chapter Handbook

**Chapter Officers**
All chapters, by virtue of their bylaws, have officers. While chapters vary widely in number of members and geographic size, all chapters require dedicated leadership to ensure a functioning and active chapter. Specific roles and responsibilities can be somewhat flexible from chapter to chapter based on the availability of active members willing to participate as officers. The following is a suggested list of duties for the most common chapter officer positions, but individual chapters may wish to assign some of the duties to different officers than those listed below, or they may wish to combine some of the positions.

President

1. Presides at general and business meetings of the chapter.
2. Presides at executive board meetings of the chapter as coordinator of all chapter projects.
3. Delegate’s duties not specifically assigned to other executive board members.
4. Appoints standing and temporary committees.
5. Monitors the progress of all chapter activities.

President-Elect

1. Attends all general, business, and executive board meetings of the chapter.
2. Presides at general, business, and executive board meetings of the chapter in the absence of the president.
3. Acts as program chairperson. (Some chapters may prefer to have a separate program chairperson.)

Immediate Past-President

1. Attends annual business meetings.
2. Will take the place of the president or president-elect should they be unavailable to attend meetings/events.
3. Will call to order chapter meetings if the president or president-elect are unavailable.

Secretary

1. Attends all general, business, and executive board meetings of the chapter.
2. Takes minutes at all business and executive board meetings.
3. Regularly review chapter bylaws and identify issues requiring update based on current processes.
4. Prepares and mails announcements for chapter meetings.
5. Orders supplies.

Treasurer

1. Attends all general, business, and executive board meetings of the chapter.
2. Establishes a checking account in which the treasurer and at least one other board member—but preferably two—may sign checks.
3. Keeps accurate financial books while paying all bills and making all deposits.
4. Prepares a brief report to be read at each chapter board of directors meeting on receipts, expenditures, and latest balance.
5. Prepares a summary report at the end of the year.
6. Each year, submits a formal chapter financial statement to the AMWA treasurer and headquarters by August 1, listing income and expenses of the past year, along with proposed income and expenses of the forthcoming year (i.e., the chapter budget). The suggested
formats for the financial statement and budget are provided in the Chapter Report and Financial Templates section of the Chapter Leader Toolkit.

7. Maintains financial files and passes them on to the next chapter treasurer.

Change of Officers

The chapter president or the membership liaison (see next section for details about this potential appointment) must immediately notify headquarters when there is a change in officers. The notification should include both the effective date and the duration of each officer’s term. Chapter officers and leaders (committee or other work group chairs) should be listed in the chapter reports.

Chapter officers are listed on the AMWA Website at: [http://www.amwa.org/chapters](http://www.amwa.org/chapters)

The AMWA website will only list the president, president-elect, immediate past-president, secretary, treasurer, membership chair, and conference chair. This decision was made by chapter leaders in an effort to ensure consistency between chapters and clarify expectations for the webpage. Other chapter leaders may be listed on the chapter website at the discretion of each chapter.

**OTHER POTENTIAL APPOINTMENTS IN THE CHAPTER STRUCTURE**

While AMWA recognizes that some chapters may have different names for the positions listed below, generally speaking the following titles apply to all chapter leadership positions.

Membership Liaison

1. Attends all general, business, and executive board meetings of the chapter.
2. Serves as chairperson of a membership committee. (Most chapters have only a membership officer rather than an actual committee.)
3. Plans and implements recruiting methods and retention efforts.
4. Works with AMWA HQ to ensure membership lists are accurate.

Newsletter Editor

1. Sets up yearly schedule for producing newsletter.
2. Solicits newsletter content, assigns articles as needed, edits and reviews submitted content.
3. Gives the chapter BOD delegate information on the chapter newsletter’s activities to include in the chapter report sent before each BOD meeting.
4. Works with other chapter leaders to ensure important membership information and chapter activity promotions are included in newsletter or other outreach vehicles.
5. Works with AMWA HQ to distribute AMWA Annual Conference information.
6. Distributes copies of chapter newsletter to headquarters, other chapters, the AMWA Journal editor (for possible inclusion in the Chapters Corner section of the Journal), and the Administrator of Chapters.

Webmaster

1. Works with chapter officers to keep information updated regarding chapter contacts and activities on the chapter website.
2. Ensures that chapter website complies with AMWA’s Chapter Website Guidelines.

Program/Conference Chairperson
1. Works with AMWA HQ and chapter officers to plan and implement a chapter conference and/or other various programs throughout the year.

2. Works with the newsletter editor or webmaster to create conference/program brochures and to promote the event.

Regional Director/Member-at-Large/Satellite Liaison (for geographically large chapters)

1. Serves as a liaison between the chapter’s board of directors and members in locations far from the chapter’s center or centers of activity.

2. Organizes regional events.

Chapter Delegate to the AMWA Board of Directors meeting

1. Serves as the chapter’s delegate to attend the AMWA BOD meetings.

2. Prepares a report on chapter activities sent to headquarters for each BOD meeting; the exact deadlines for each year’s reports are provided by HQ. In some chapters, the president prepares the report.

3. Serves as the liaison between the AMWA BOD and the chapter board, communicating BOD activities and decisions to the chapter board and membership as appropriate.

AMWA BOARD OF DIRECTORS MEETINGS

The AMWA Board of Directors (BOD) convenes 2 times a year. The first meeting of the new administration is held in the spring, and the second meeting is held in conjunction with the AMWA Annual Conference each fall. The voting BOD is made up of AMWA’s elected officers, the department administrators, and the assigned chapter delegates.

Article IV of the AMWA bylaws states that, “One delegate is elected or appointed by each chapter. Each chapter is entitled to elect or appoint one additional delegate if it has 400 or more members. Chapter delegates may hold office in their chapters. The delegates assume their official duties at the first meeting of the BOD following the annual business meeting of AMWA and serve until their successors are designated.”

Chapters should assign a delegate before each BOD meeting. To maintain continuity, the same delegate should, if possible, attend both BOD meetings for a given administration. However, individual delegates’ terms of service should be limited to 5 years or fewer.

Chapter delegates serve as voting BOD members and thereby help determine the future of the organization. Furthermore, the board meetings provide a wealth of information about the operations of AMWA.

To ensure that all chapters are represented at BOD meetings, chapters are encouraged to reimburse their delegates’ reasonable travel expenses for at least 1 BOD meeting a year, with priority given to the spring meeting. A chapter may also choose to pay some or all travel expenses for its delegate(s) to attend the fall BOD meeting held in conjunction with the Annual Conference. Each chapter is free to establish its own reimbursement policy, which should be openly communicated to chapter members.

To help minimize expenses, AMWA headquarters negotiates favorable room rates at the meeting hotel, and provides some meals as part of the meeting. Chapter delegates make their own travel and hotel

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reservations, pay their own hotel and meal bills, and request reimbursement from the chapter. Delegates should make every effort to obtain low airline fares and to minimize other expenses.

**Chapter Fund**

Need-based financial assistance is available from HQ to ensure that as many chapters as possible are represented at BOD meetings. The AMWA BOD voted in 2004 to create a fund to assist chapters. The fund is used to assist as many chapters as possible with travel and hotel expenses incurred by sending delegates to an AMWA BOD meeting. The fund is need-based and not designed to award assistance to chapters on the basis of size alone.

Chapters sending delegates to the AMWA BOD meeting are invited to apply for assistance and submit an application form, including an estimate of travel expenses, a financial statement for the previous fiscal year, a budget for the current fiscal year, and the chapter’s most recent bank statement. The Budget & Finance Committee (B&F) reviews all applications to determine which chapters qualify for assistance and how available funds—which are not a loan and therefore do not have to be paid back—can be equitably distributed. After the meeting, chapter delegates awarded assistance will submit documentation of expenses to HQ for reimbursement.

**CHAPTER COMMUNICATION TOOLS**

There are two main types of communication tools for chapters to consider in their work.

Intra-chapter communication: Providing information to chapter members and engaging in discussion between the chapter and its current and potential members. This typically includes:

- Direct mail
- Emails
- E-newsletters
- Chapter website
- LinkedIn discussion group
- Online meeting or webinar tools
- Social media
- In-person meetings
- Chapter events

Inter-chapter communication: Sharing ideas and resources among chapter leaders from various chapters. This mostly is accomplished through:

- Chapter leader teleconference
- Chapter leader forum
- Chapter delegate meeting
- AMWA Documents Dropbox

**Chapter Leader Teleconference**

The chapter leader teleconference is an opportunity to discuss issues affecting chapters. It is usually held during the second Monday of each month at 11:00AM Eastern. All chapter leaders are invited to attend. Reminders to attend, as well as agendas for and notes from, the chapter leader teleconference are posted to the Chapter Leader Forum.
Chapter Leader Forum

The AMWA chapter leader forum was created to improve communication and support information sharing among chapters. The forum allows delegates, officers, and other interested members to communicate with one another, the headquarters staff, and the chapters and membership administrators on the Executive Committee. The forum can be used for posting documents to share (such as chapter newsletters), creating polls, and much more.

To enter the AMWA chapter leader forum, simply follow these steps:

1. Log into amwa.org with your username and password
2. Click on Online Forums from the Quick Links Menu
3. Select Chapter Leaders Forum
4. Enter password: subject to change annually, contact membership@amwa.org
5. Optional: Set up email notifications for posts to Chapter Forum

Chapter Delegate Meeting

Attendance by chapter delegates at BOD meetings is important to AMWA and the chapters. This is an opportunity for chapters to be represented in crucial AMWA policy decisions that are adopted by the association. At each BOD meeting, a Chapter Delegates Meeting is organized to support the sharing of information, resource concerns, and successes with other delegates. The agenda for the chapter delegate meeting is typically developed though the discussion items presented through the chapter reports and topics of interest from recent chapter teleconferences.

AMWA Documents Dropbox

AMWA hosts a Dropbox account for chapter leaders to access and share relevant materials. To access the Dropbox please send a request for an invitation to join to membership@amwa.org.

Chapter Websites

Chapter websites can serve to inform chapter members, AMWA members outside the chapter, and interested nonmembers about chapter activities, publications, and other items of potential interest. They can also be used to highlight the accomplishments of individual chapter members, e.g., chapter members who will be leading workshops at an upcoming AMWA Annual Conference, or chapter members who have received an award related to their work in medical writing or in AMWA.

AMWA HEADQUARTERS ACTIVITY

Maintenance of Membership Records/Association Management System

AMWA’s headquarters maintains a complete membership list, which is updated daily through our Association Management System. When members update their contact information in their profile on the website, it is automatically updated in the AMWA database. AMWA shares the most up-to-date contact information in the membership lists deployed to chapters.

Chapter Dues Rebates

AMWA membership dues are all collected by AMWA HQ upon new membership or renewal payments. Chapters receive a portion of dues in the form of rebate check, which is calculated and sent twice a year.
to chapter treasurers. The amount of dues that is assigned to chapters is determined by the AMWA BOD (currently $18 per professional member). The rebate amounts are calculated at the calendar year end (December 31) and fiscal year end (June 30). Checks are typically sent in January and July.

**Chapter Membership Lists**

All membership lists are emailed to the chapters through each chapter’s designated membership liaison, who is responsible for maintaining and distributing membership information. These update emails are sent from headquarters approximately 2 times per month, but the frequency varies with AMWA HQ’s workload.

Information sent to the membership liaison will usually include the following items:

- Complete membership list
- Names of dropped members after the end of each month
- New members
- Overall membership across AMWA

If a chapter has not designated a membership liaison, the updates go to the chapter president or their designee.

Upon request, AMWA headquarters will send chapter officers an electronic file of the chapter’s membership outside of the regular schedule as noted.

**New Member Program**

AMWA HQ communicates with all new members though a new member program. The communication schedule and general topics include:

1. Upon joining: Confirmation email with welcome language is sent from the AMWA database.
2. Weekly: all new members for that week receive "enhanced" welcome email ("highlights").
3. At 30 days: Code of Ethics is mailed along with welcome letter from President and Membership staff.
4. At 60 days: Stay Connected email (networking benefits to members).
5. At 90 days: Benefits emails (top 5 benefits of being an AMWA member).

Chapters are highly encouraged to participate in the on-boarding and new member engagement program.

**Membership Renewal Notices**

AMWA HQ is responsible for the membership renewal and dues notices process. However, chapter communications can supplement and support the renewal effort. AMWA HQ sends email notices and paper invoices regarding dues based upon the membership renewal date and follows a regular schedule:

- Email notice 60 days before the anniversary
- Paper invoice 6 weeks before
- Email notice 1 month before
- Postcard “reminder” 1 month before
- Email reminder 15 days before
- Email at expiration
- Email “drop” notice and request to respond to exit survey sent 30 days after the anniversary
If no renewal payment is received, one month after the expiration date the member is dropped from active status, and the name is forwarded to the chapter.

**AMWA UPDATE**

*AMWA Update* e-newsletter is published at least once per month and is sent to all AMWA members. *AMWA Conference Connector* is a special issue of Update that focuses on the Annual Conference. It is published at least once a month during the run-up to the conference each year.

**CHAPTER SUPPORT FOR AMWA MEMBERSHIP: Engagement, Retention, and Renewal**

**New Members**

To support the on-boarding process of and to encourage engagement with new AMWA members, chapter presidents, or other designated officers, are highly encouraged to write a letter or email of welcome to the new member. This letter should advise the person of the next chapter meeting and any other activities or resources of interest that is unique to the chapter. If the chapter has a newsletter, the latest issue should be included with the letter (if not already sent).

**Lapsed Members**

To encourage members to renew their membership with AMWA, it is highly encouraged that the chapter president (or other designated officer such as the membership liaison) contact recently lapsed members. Often the renewal has just been overlooked. If not, personal contact gives an opportunity for feedback and can lead to a reinstatement.

**Current Members**

Regular communication is critical to ensure an engaged and informed membership. Please see intra-chapter communication tools for more information.

**Potential Members**

Chapters are encouraged to develop outreach programs to reach potential members and participate in promotional activities to expand the reach of AMWA.

**ACCOUNTING PROCEDURES FOR CHAPTERS**

The AMWA fiscal year is July 1 through June 30. Chapters may have different fiscal years; – please see your chapter bylaws. According to the AMWA bylaws, chapters are expected to submit a copy of their annual budget, balance sheet, and end-of-year financial statement by August 1 of each year. The balance sheet and end-of-year statement may be combined. The exact date the financial reports are due may be modified to accommodate the fall AMWA BOD meeting schedule. AMWA HQ will notify chapters as to any extensions to this deadline.

It is important to maintain up-to-date records by immediately recording income and expense entries on all transactions as they occur. The accounting procedure, known as a “single entry” bookkeeping system, is usually adequate for chapters. This procedure forms the basis of the financial report given at the year-end.
chapter board meeting, as well as the required financial report that chapters submit to headquarters annually. An accounting journal can be obtained in an office supply store. Chapters can also use accounting software or spreadsheet programs for this purpose.

**USE OF AMWA LOGO/DEVELOPMENT OF CHAPTER LOGO**

The AMWA logo represents the association and all use of the logo must be approved expressly by AMWA. Members have the right, and are encouraged, to state their affiliation with AMWA. However, the AMWA name or logo may not be used in any manner that implies endorsement by AMWA or implies that the member is an official spokesperson for the organization.

Chapters may use the AMWA logo on their chapter websites, at approved chapter events, and on membership promotional materials without the need for additional approval with each update or modification to such materials. Some chapters have added their chapter name to the AMWA logo for use on their website (see http://www.amwacarolinas.org/wp/). Permission for the creation of a modified AMWA logo for use by an individual chapter should be obtained from and kept on file with AMWA.

*Revised by the AMWA Chapter Handbook Committee, September 2014*