Checklist for Starting a New Chapter

This checklist is for State or Region Presidents and AFA members who wish to start a new chapter. Its only assumption is that there appears to be a sufficient degree of interest by area AFA members.

Enter the date each item is completed in the appropriate box, or check the N/A box if the item does not apply. Report any errors or inaccuracies to the Vice Chairman of the Board for Field Operations.

Action	Date Completed	N/A
NOTES: This checklist is based on guidance in the Field Operations Guide (FOG). Leaders of a reactivating chapter should familiarize themselves with Chapters 9 (The Chapter), 10 (Planning and Reporting), and 13 (Resources for Field Units), and the section in Chapter 12 on support payments. The current version of this document is available online in the "Guidebooks and Handbooks" SharePoint folder on the AFA web site. Access the folder from the Field Resources page of the AFA web site, www.afa.org/membership/resources. Chapter leaders should also familiarize themselves with the contents of the Field Leaders Training page of the AFA web site: https://www.afa.org/membership/trainingmodules. Keep in mind that the FOG is a *guide*. Requirements listed in it *may* be waived by the Vice Chairman of the Board for Field Operations (VC/FO).		
1. Coordinate with State or Region President (VC/FO for overseas locations) on the future chapter's area of responsibility (AOR; based on ZIP code areas, including APO ZIP codes overseas) and resolve membership conflicts with existing chapters.		
2. Request the following information from AFA National's Member and Field Relations department:		
a. The packet that contains a sample charter, constitution and bylaws, plus membership materials and information on how to publicize and conduct organizational meetings from field@afa.org.		
b. A roster of members living in the AOR from membership@afa.org.		
3. Contact these members, plus friends, business acquaintances, etc., to invite them to an organizational meeting. Encourage them to invite others who might be interested in joining.		
4. Hold the meeting at a central location. In-person meetings are a much better option, but hold the meeting virtually if necessary, or as a hybrid of in-person and virtual.		
a. Confirm there's interest in forming a chapter and willingness to help do it.		

Action	Date Completed	N/A
b. Collect contact information of the attendees and potential members.		
5. If there's enough interest to continue:		
a. Schedule an organizational meeting within a month after the first one. Twenty to twenty-five voting members are needed to form the chapter. (Twenty is the minimum, twenty-five is recommended to cover for drop-outs.)		
b. Inform non-attendee members of the first meeting's results and invite them to the next one.		
6. Form a membership committee to seek additional members.		
7. Build the initial ExComm—president, vice president, secretary, and treasurer (or secretary/treasurer)—plus any other appointed positions you have volunteers for.		
8. Create a draft charter (and fill out a lot of other forms) and send them to the State President (Region President if the chapter will be the only one in the state, or the VC/FO) for endorsement and approval. Models and other information are in the "Resources for New Chapters" folder.		
9. Request start-up funds from the State President, Region President if the chapter will be the only one in the state, or VC/FO for overseas chapters.		
10. Establish federal and state non-profit status.		
a. AFA (field@afa.org) will assist with applying for federal 501(c)(3) status.		
b. Request assistance from the State Treasurer or Region President, if appropriate, for guidance on how to apply for state non-profit status. Overseas chapters may wish to explore the possibility of getting a Value Added Tax exemption.		
11. After the charter is approved, National will send an additional information package containing any updated information on chapter administration, additional membership materials, and how to prepare and submit the required reports and plans.		
12. Contact AFA National's (field@afa.org) to establish the chapter e-mail addresses, chapter portal access, etc.		
13. Direct the new ExComm to the training videos they should watch (listed at https://www.afa.org/content/dam/afa/trainingmodules/Rec-Field-Ldr-Trng.pdf), and other resources they should get familiar with, like the FOG, upon assuming their new positions.		

Action	Date Completed	N/A
a. Have the new team identify which of AFA's mission areas would be best for them to focus on first, and what specific elements of that mission area. Chapter should probably focus on just one or a few to start with: a crawl/walk/run model.		
14. Coordinate with the State or Region President, or VC/FO for overseas chapters, as appropriate, to connect the chapter with a mentor chapter that is similar in size and situation to the new chapter. This chapter may be in another state or region (or even another country).		

For support or answers to questions, contact:
your State President, _____, at
[2-letter state abbreviation].President@afa.org or _____ (phone number),

your Region President, _____, at
[region name].President@afa.org or _____ (phone number),

the VC/FO at vcfield@afa.org or _____ (phone number), or

AFA's Member and Field Relations staff at field@afa.org or (703) 247-5800 or (800) 727-3337, x4821.

Extensive checklists and training modules on a wide variety of topics are available on the Field Leaders Training Resources page of the AFA web site. The page is divided into five areas: Administration; Communications; Leadership, Recruiting & Retention; Programs; and Organization.

New elected and appointed chapter officers should first review the Recommended Field Leader Training document, which lists the modules they should view after they assume their new position (indicated by an A in the column for their position for each module).

Survey

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