**TEAM UP FOR 1 CHAPTER HAND BOOK**

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**First Things First: Starting a Team Up For 1 Chapter**

As a Team Up For 1 (TU41) Chapter, your organization will be affiliated with a progressive, professional national organization that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?

Your local organization will affiliate with our national organization. The chapter is assigned to a geographical region & will have a regional director that represents the chapter’s interests.

There are two main ingredients for forming a TU41 Chapter: 1) Contain at least five willing members whose goals are consistent with those of Team Up For 1, 2) form a committee to lead the organization.

The committee is important because they ensure that a chapter is "plugged in" to the chapter’s mission. By creating committee positions, you allow members to take an active role in the leadership of the organization.

A local volunteer committee has appointed positions such as media monitoring, jobs/internships, community action, and fundraising. These committee leaders can be appointed annually by the executive director to one-year or two-year terms.

TU41 chapters are eligible to host regional events. Members of TU41 1 chapters are eligible for discounted registration fees at regional and national meetings and events.

By becoming a TU41 chapter, you can join our national effort to establish an organization that can be a unified force to support children with chronic and life threatening illnesses.

**About Dues**

There are general operating costs associated with effectively managing each Team Up For 1 Chapter. This cost includes salaries of staff with benefits, materials, travel, telecommunication, trainings, supplies, equipment, and insurance. Our programs are funded through private donations and special events. To begin a chapter, an initial donation of $5,000 must be secured or donated by the person(s) interested in starting the chapter, made payable to Team Up For 1. Additionally, the person(s) interested in starting the chapter must pledge to raise/donate at least $50,000 annually for each of the first 5 years of the chapter. This may be accomplished by seeking individual or corporate donations not already affiliated with Team Up For 1, working with a school organization, or by forming a community committee to take on the fundraising efforts.

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**Naming Your Chapter & Submitting Your Application**

Team Up For 1 has just two naming conventions that it will accept as a part of a chapter application — “City/State/Region” Association of Team Up For 1 or Team Up For 1- “City/State/Region.” The reason for this is due to the desire to have similar branding for Team Up For 1 chapters.

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| --- |
| An interested group desiring to become a Team Up For 1 chapter should visit the chapter resources at to access the application form. Contacting the National Office staff will also be helpful in identifying the information online and/or accessing additional information/contacts that may be of assistance in starting your chapter. As you begin to prepare your paperwork, the following items are a required part of the affiliate application. |
| 1) Application form    2) Letter from Regional Director supporting candidacy    3) Letter briefly stating history, goals and purpose    4) Copy of the chapter's bylaws    5) Chapter name, which should comply with the Team Up For 1 naming convention    6) Chapter roster, listing member names and company or schools    7) Chapter President and Vice Presidents  All chapter applications and supporting materials should be sent to the Team Up For 1 National Headquarters. The Team Up For 1 staff will forward it to the Team Up For 1 Board of Directors, which will review the application for approval. |

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**Establishing a Place of Business for Your Chapter**

Finding a place to call home doesn't have to be difficult. Assess your resources to see if a company or community agency in your area can donate office space. Perhaps there is an unused area at a local television station, or a vacant office neighboring the local newspaper. Whatever the case, the local chapter should try to settle on a place that is centrally-located and easily accessible by your leaders.

Ideally, the space should accommodate your technology and logistics needs as well. Some chapters use offices as their mailing addresses, while others prefer for mail to go to a post office box. Whatever your preference, be sure all of your mailings include the preferred address and a phone number. While your office may not be staffed, it's still a good idea to make sure an answering service or recorder is available to take calls. That also means someone must regularly check the messages.

At the same time, be sure to stock the office with the minimal level of resources you'll need to take care of business: letterhead, office supplies, a computer with Internet access, a printer, and so on. (National TU41 will help with these supplies)

You may find that an actual office space is not feasible to start. You may house your organizational business on the Web and utilize a post office box. Don’t let the absence of a physical office space prevent you from starting a chapter.

**Professional Chapter Audit**

Each year, professional chapters are required to submit an annual audit with a December 1 postmark deadline. To review the audit materials, contact National Headquarters More information on the chapter audit can be read on page 15.

**Organizing Student Chapters**

It's easy to start a Team Up For 1 Student Chapter. The hard part is maintaining a consistent level of production and enthusiasm for the chapter to thrive.

When starting a chapter, it's necessary to seek out students who are committed to turning the dream of a Team Up For 1 student chapter into a reality. After you've decided to start a chapter, you should notify the Team Up For 1 National Office of your intentions. The office can provide you with useful information for the Student Chapter.

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All chapter applications should be sent to Team Up For 1 National Headquarters.

The staff will forward the application to the Team Up For 1 National Headquarters for review. If the application is complete, the National Headquarters will present the application at the Board of Directors meeting, which takes place quarterly - usually in January, April, August and October. At this time, the Board will vote on affiliation status.

There are so many intangibles that go into starting a student chapter. If you have a solid group of students and a supportive faculty adviser who are willing to do the necessary work, your school's name will be added to the list of Team Up For 1 student chapters.

**WRITING BYLAWS**

Bylaws specify the rules by which an organization will operate.

What are bylaws?

• Outline specific procedures for the group’s functioning

• Help the group conduct business in an orderly manner

• Provide further definition to the constitution

• Are easily revised, usually by a simple majority, and revised regularly as procedures change

Bylaws establish the rules governing the management of the chapter. Among the items you should include are your chapter's name, purpose, membership standards, voting standards/procedures, officers, dues, meeting information, standing committees, fiscal policies and provisions for how to rewrite the governing documents.

This set of procedural standards not only helps keep order in the organization, it is also a legal document required by all incorporated entities.

It is a good policy for every member, upon joining the chapter, to be given a copy of its governing documents and any other special rules or policies that have been adopted. This will help the member become familiar with the chapter and hopefully encourage their full participation. (National TU41 will supply you with our bylaws which you can utilize to create your respective chapter’s bylaws – to be approved by National TU41)

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**PLANNING & EXECUTING AN EFFECTIVE MEETING**

An effective chapter meeting can energize your local membership.

Your chapter can provide quality programs and services for its members and advocate on behalf of Team Up For 1. Your meeting may be your organization's most effective retention tool. Effective meetings don't just happen. They require planning to make sure your chapter is not wasting the most precious commodity of any individual’s time.

PAD your meeting for success. PAD is an acronym for Purpose, Agenda & Distribution. Your meeting should have a purpose, with a set agenda that has been distributed ahead of time along with any lengthy materials you want members to consider. Choose to hold meetings at sites members find easily accessible.

Chapters may benefit from allowing time before or after meetings for socializing, giving members the option to leave or arrive late out of respect for their time. First, start your meeting on time. Committees can and should be utilized to handle special projects and functions. Allow time for committee reports to be presented, keeping in mind every presentation doesn't call for discussion.

Finally, as you conclude your meeting on time, make sure you recap the highlights and next steps your chapter plans to take to meet its goals and objectives. Agree on your next meeting. Whether it is a social function or one for professional development, remember the principles on which Team Up For 1 was founded.

**STAGING ELECTIONS**

How elections are held can and should vary based on the size of the chapter. But one thing is paramount: Elections must be “above board.”

The election of chapter officers is one of the most important functions of a Team Up For 1 Chapter. How elections are held can “and should” vary based on the size of the chapter. But one thing is paramount - the nomination and election process must be “above board.”

A chapter’s nomination and election process should be included in the chapter’s bylaws. Team Up For 1 election rules can be used as a guideline, however, a chapter can adopt its own rules as long as they are in the spirit of being a fair and open process.

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Here are some tips that will help in planning a successful election:

1. Devote a good portion of your meeting, at least one month before the elections, to discuss the upcoming election and spell out the ground rules. General elections should be held during the same month of every odd year. (National TU41 recommends holding elections in November – so new officers can be properly introduced and start their terms of service in January)

2. At this same meeting, you should ask for nominations of officers (and other board members) and set a date, time and place for the election (often times held during the next membership meeting). Officers seeking re-election must go through this re-election process as well, even if running unopposed.

3. If you have nominations, make a list and send it to members with all the necessary

Information - including candidate bios and instructions to vote in-person and absentia, if permitted in your bylaws. For positions with no nominees, note as such, with instructions on how to submit absentee nominations.

4. If there are offices without any candidates and your chapter decides to hold its election during a regularly scheduled meeting, consider taking nominations from the floor.

5. Many chapters successfully vote for officers with a show of hands. Others have more elaborate procedures that involve absentee or proxy votes and secret ballots. One rule of thumb is that the larger the chapter, the more likely a secret ballot with some kind of absentee vote should be used. A small chapter would be better served by holding the election during a regular scheduled meeting and using a show of hands.

As previously emphasized, elections must be handled in a very sensitive manner. You always want to make sure that anyone interested in an elected office has a fair and equitable chance to be nominated. Out of all these suggestions, perhaps one of the best guidelines to follow is common sense.

For more information, see The Team Up For 1 Board of Directors’ Operating Procedures.

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**OFFICERS AND THEIR RESPONSIBILITIES**

Team Up For 1 Operating Procedures, the duties of the offices of president, vice president, secretary, and treasurer are as follows:

1) The President shall be the Executive Officer of the organization and membership meetings. It shall be the duty of the President to:

* Order the disbursement of the funds of the organization as directed by the Executive Board.
* Exercise general supervisory powers over the work of the other members of the Chapter
* Request and require such additional information from chapter members as deemed necessary to operate the organization effectively and efficiently.
* Provide a full report of the administration and make such recommendations as deemed appropriate for the good of the organization.
* Appoint chairpersons and members of the Standing Committees as well as create any committees, with input from the National Chapter, deemed necessary. He or she shall remove inactive chairpersons and members.
* Be an ex-officio member of every committee.
* Complete the annual Team Up For 1 program audit and financial budget to be submitted to Team Up For 1.
* Give a year-end status report on the organization at the December membership meetings.
* Be bonded to the organization in a sum sufficient to cover the probable amount of funds he or she might be called upon to handle during the term of office.

2) The Vice Presidents shall be the Deputy Executive Officers of the organization and, at the direction of the President, one Vice President, shall serve as the chairperson of membership meetings in the absence of the President. It shall be the duties of the Vice Presidents to:

* Serve as coordinators of all committees, shall ensure that the committees function and provide the National Headquarters with a periodic report of progress and work being performed by the committees.
* Perform such duties as are assigned to them by the President and National Headquarters

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3) The Secretary shall be the chief record keeper of the organization. It shall be the duty of the Secretary to:

* + Keep an accurate account of the proceedings of the board and membership meetings.
  + Take minutes at regularly scheduled membership meetings, read minutes at the monthly meetings; ensure that the minutes are archived for seven years for audit and tax purposes. The secretary shall provide written copies of the minutes for members at the monthly membership meeting. Perform such secretarial duties of the Executive Officers as may be necessary at the direction of the President.

4) The Treasurer shall be the Financial Officer of the organization. It shall be the duty of the Treasurer to:

* Be bonded to the organization in a sum sufficient to cover the probable amount of funds he or she might be called upon to handle during the term of office.
* Receive and account for all funds of the organization.
* Disburse the funds of the organization on order from the President and/or the National Headquarters. Should any disbursement of funds appear to be unlawful, the Treasurer shall submit the question of the legality of such order for the vote of the Executive Officers. File the annual incorporation papers for Team Up For 1.
* Report all income and expenditures, using generally accepted accounting principles, at each membership meeting in an uncomplicated form, and at such other times as the National Headquarters may require.
* Carry out the duties outlined in the Team Up For 1 Financial Procedures.
* Perform such financial duties of the National Headquarters as may be necessary at the direction of the President.

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**FUNDRAISING**

Fundraising can be the Achilles heel for many ambitious chapters. Organizations without a comprehensive, well- organized plan for raising money will often find their activities curtailed and achievements limited, as the lack of resources puts serious boundaries on the projects they can tackle.

This section of the handbook will suggest some approaches for developing a sound fundraising strategy. Sometimes, the toughest part of running a chapter is learning how to raise money for its operation. But running a chapter requires raising money for its activities. (National TU41 will assist you with “getting started”)

Presenting a healthy year of programming – from assembling a social get-together at a local restaurant to organizing a 1,000-seat banquet – requires money for deposits, early fees, flyers, advertisements and whatever else is required to make events successful.

Here are a few tips on how to develop your bankroll:

**First, have a plan! Be organized! Run your chapter like a small business!**

Too many chapters approach fundraising as a piecemeal effort; something they undertake for specific initiatives or goals. But groups can find greater success by planning fundraising efforts over a calendar year, developing a budget and scheduling expenditures to accommodate your income timetable.

Some chapters may have a different experience, but many groups seem to be most successful focusing their fundraising on a single event they replicate each year which earns enough profit to support activities for the next 12 months.

Otherwise, it becomes easy for chapters to fall into the trap of constant fundraising – expending time and energy on a range of smaller moneymaking projects which don’t leave much time to serve chapter members.

Typical projects used as a big moneymaker include a gala event or a 5K run. These events are planned to create big profits, requiring more sweat and resources for a greater reward.

If a large event sounds like too much work or ambition, then plan a series of smaller events throughout the year. But be realistic about the amounts of money you hope to raise and the amount of effort chapter members will commit to pulling off the event.

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Don’t assume members can each sell eight tickets to an event, for example, if they don’t have a history of pulling off that kind of effort. It is easy to find your group committed to an expensive event, only to discover not enough members have sold tickets to cover the costs.

**Develop partnerships with sponsors!**

Obtaining the support of sponsors can help offset the costs of many events, reducing the pressure to sell tickets or rack up event entry fees.

**Plan events carefully and with detail!**

This is another recommendation which sounds obvious and simple. But a host of worthy fundraising efforts have been derailed by the lack of proper planning or inability to foresee all the challenges involved.

It helps to create a committee for big fundraisers, assigning each member different areas of responsibility with one or two chapter officers in charge overall. Such groups can be a great way to pair less active members with more involved supporters and spread the workload around.

**Creating a timeline** for every event. Include important milestones in developing the project – it’s a great way to maintain strong communications among organizers while staying focused on your goals. Comprehensive schedules ensure you don’t forget important details and can act as reminders for committee members for what tasks they must complete and when. (To make it easy - National TU41 will provide you with past event timelines)

Likewise, detailed plans for fundraising goals can also help the effort. Knowing how much income is expected from sources such as awards entry fees, sponsorships, ticket sales, silent auctions or whatever other fundraising mechanisms you use, can help you judge how much to spend presenting the event.

**Expenses should be estimated in detail** as well; knowing how much headroom you have between expenses and expected profits can make the difference between a project that finishes in the black and one that doesn’t.

Fundraising is more effective when tied directly to specific uses and goals rather than seeking general operating funds. For example, if you have enough sponsors to defray costs for a scholarship banquet, it can help spur ticket sales if you can announce that all of the ticket proceeds go to the scholarship fund. Some donors and supporters would rather write a direct check to the cause than to underwrite food and entertainment.

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**Ask for free and in-kind support!**

As a nonprofit charity organization, Team Up For 1 chapters can offer potential donors the ability to deduct donations from their taxes – even donations made in services or products.

Additionally, chapter events offer potential partners access to a ready-made audience of tastemakers and community leaders. A restaurant chain may not want to provide $3,000 in cash for a banquet, but it might be willing to provide $3,000 in catering services without charge or at a reduced rate – particularly in exchange for status as a featured sponsor.

In-kind service can be used in a variety of ways. A free stay for two in a local luxury hotel can be raffled off, either as part of a larger event or as a fundraiser all its own. Chapter members who are photographers and artists can donate images for framing and auction; members who receive promotional items at work can donate the books or t-shirts or Frisbees for auction or raffle.

In-kind donations are also great for items which you can place in “goody bags” for guest at the end of big events. Once again, donors get a bit of free promotion by having something connected to their brands or businesses handed to your audience, while you get another fun element for your event relatively free of charge.

**CREATING YOUR OWN SUCCESS STORY:**

**THE MAKINGS OF A GREAT CHAPTER**

If your goal is to create a successful Team Up For 1 chapter, choose your ingredients wisely. Leadership must be flexible enough to understand and plan according to the current industry climate and members’ needs. No single recipe will produce the same level of success in every chapter. Regional and chapter leaders share these tips on what it takes to make your chapter a success.

Have a strong belief in your organization, its mission and its principles. Establish consistent communication with members - Begin with efficient communication. Survey your membership. Find out what works best for your Team Up For 1 chapter. Technology has given us e-mail, social networking, websites, blogs, texting, electronic invites, free conference calling and more. These are all quick and useful communication tools, but don’t forget the personal touch. One-on-one phone calls still have a big impact. Be careful not to inundate your members. They will stop paying attention. Whatever you do, all communications should be informative and concise.

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Goal oriented leadership is a key ingredient. Careful planning, realistic yet challenging goal setting will keep members engaged. Leadership must plan far beyond the year in front of them. They must decide how they want the chapter to grow in the future. Chapter leadership can develop a game plan, which includes grooming new officers, innovative programming and successful fundraising.

Create a contacts database – Maintain, create and cross-reference a list of members, lapsed members and other chapter contacts. Assign this important task to a reliable member.

Diversify your leadership – Make sure your officers and members have various skills and personality types. Learn to appreciate members’ strengths and weaknesses. All members should feel represented and heard at the board level.

Develop the future – Recruit student members and provide ongoing mentoring. Invite students to participate in various professional and social events. Allow them to do enterprising projects for the chapter.

**PROMOTE YOUR CHAPTER ONLINE & VIA SOCIAL MEDIA**

With a myriad of free and low-cost social media tools available, these resources can be an important part of your efforts to recruit new members and keep current members informed of your activities. Tools available to do this include a website, blog, Twitter, a Facebook fan page, a Flickr photo account and a YouTube channel, to name a few. You don’t need to do all of these – but choose at least two as part of your overall communications plan. Below are examples of social media and how Team Up For 1 chapters are using them:

**WEBSITE**

A website can be the face, the welcome card for a chapter. National Headquarters will set up a website for every chapter. Each chapter will be required to maintain and update website.

**BLOG**

If a website is too much, you may want to consider a blog. The two most popular blogging platforms are Google’s Blogger and WordPress.

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**TWITTER**

Twitter is a free microblogging site that allows 140-character updates. Chapters use Twitter to hold discussions, publicize events, ask for assistance and follow industry events. Use the free web-based Hoot Suite platform to administer and monitor your Twitter account, including following topics of interest and scheduling tweets. It also allows you to automatically post to your Facebook pages, eliminating a step in the process.

**FACEBOOK**

Chapters can create fan or groups pages as a tool to recruit and disseminate information. Uses it to post monthly chapter meetings, local related events and information of interest to chapter members. The site also has a calendar of events, posts of event photo albums and videos and links to chapter contacts and the official website.

**COLLEGE CAMPUS CLUBS (AFFILIATE CHAPTERS)**

**Working with Student Chapters**

Team Up For 1 fosters relationships with High Schools and Colleges.

For many local chapters, there are a number of ways where student outreach can be achieved; especially in those cities where there are a number of post-secondary institutions (colleges and universities) with small communities.

Having someone like a student coordinator or liaison on a committee creates a concrete relationship between the students and the chapter. The liaison or coordinator will keep the professional chapter up-to-date with student members’ concerns and needs. If there is no local student chapter, then the student liaison/coordinator would be responsible for producing programming targeted to students in the area.

In addition to area colleges and universities, chapters should look for opportunities to work with area high schools to identify high school students who may be interested in giving back.

Overall, how a chapter works with students in the area depends on that chapter’s resources. Working together can be extremely beneficial for all parties involved.

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**CHAPTER TOOLKIT AND CHAPTER AUDIT**

**Contact the National Headquarters for the Chapter Toolkit**

**Chapter Audit**

Please understand that as a public, non-profit organization, Team Up For 1 needs to keep its house in order. So Team Up For 1 requires chapters to be compliant with the association's procedures and policies to maintain Team Up For 1's integrity and mission. Each year, professional chapters are required to submit a chapter audit with a December 1 postmark deadline. Student chapters are required to submit a chapter audit with a November 1 postmark deadline. So as you embark on starting your chapter also think about the need to maintain affiliation through the chapter audit process. Plan ahead for how you are going to grow your organization and meeting the chapter audit’s requirements will set you on the right path.

If a chapter does not submit its audit on time or if the audit is missing materials, the chapter can be put on probation or decertified by the Team Up For 1 Board of Directors. Team Up For 1 does not want to do this. But, Team Up For 1 needs its affiliate chapters to maintain good standing. While the audit process can appear cumbersome, it’s actually rather easy to follow. The chapter audit requirements prepare your chapter for the coming year, helps your chapter to plan, and protects your chapter from financial issues that may arise down the road. It is good business for your chapter to conduct., so embrace it and get it done on time each year.

**The audit materials come from National Headquarters:**

**Some parts of the professional chapter audit include:**

* Audit checklist verification form
* Chapter officers contact list
* Next year’s chapter budget
* Next year’s chapter programming plans
* Bonding form and payment
* Financial controls form
* Membership roster
* Bylaws
* 501(c)(3) and/or incorporation paperwork if acquired

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