

NACNS Affiliate Toolkit

Approved by the NACNS Board of Directors on February 22, 2023

This toolkit was developed by the National Association of Clinical Nurse Specialists Affiliate Advisory Committee (AAC) to assist Affiliates and potential Affiliates of NACNS navigate the development and management of an Affiliate. Affiliates provide a collaborative voice for Clinical Nurse Specialists (CNSs) at the local, state and national level.

Purpose of Toolkit:

To provide guidance for establishing and maintaining an Affiliate. The toolkit will provide guidance by answering frequently asked questions, providing ideas and things to consider. These guidelines are not hard and fast rules except as where delineated as part of the affiliation process with NACNS. The goal is to provide resources for successful growth of NACNS affiliates and thereby successful growth of the CNS profession.

Please note that the following topics fall under the guidance and support of the Legislative/Regulatory Committee (refer to the Legislative/Regulatory Committee page on NACNS website)

- Title Protection
- Scope of Practice
- Certification, lack of specialty options across the nation
- Prescriptive Authority

Tool Kit Authored by:

Marcia Cornell DNP, APRN-CNS, RN, ACNS-BC, NPD-BC, CEN, TCRN
Senior Clinical Nurse Specialist
University Hospitals Geauga Medical Center, Chardon, Ohio
NEOCNS Affiliate

Gina Crudden DNP, APRN-CNS, ACCNS-AG, CMSRN
Assistant Professor Nebraska
Methodist College, Omaha, Nebraska



Additional Toolkit Subcommittee Members:

Janet Ahlstrom MSN, APRN-CNS, RN, ACNS-BC, NEA-BC
Clinical Nurse Specialist
University of Kansas Health System, Kansas City Kansas.
MoKan Affiliate

Andi Foley DNP, RN, APRN-CNS, EMT, ACCNS-AG, CEN, FAEN
Emergency Clinical Nurse Specialist;
St. Luke's Health System, Boise, Idaho
Northwest Affiliate

Affiliate Advisory Committee Members:

Lianna Ansryan MSN, PHN, AGCNS-BC, Gero-BC
Clinical Nurse Specialist, Geriatrics UCLA Health, Los Angeles,
California
CACNS Affiliate

Kim DiGerolamo, DNP, RN, PCNS-BC, CPHON, CPN
Clinical Nurse Specialist, Oncology, Children's Hospital of
Philadelphia
Pennsylvania Affiliate

Holly Berndt-Hilu, MSN, RN, AGCNS-BC
Clinical Nurse Specialist, Infectious Disease Research
Ascension St. John Hospital, Grosse Pointe Woods, MI
Michigan Affiliate

Marci Mechtel DNP, MSN, RN, ACCNS-P
Assistant Professor College of Nursing Michigan State University
Michigan Affiliate

Elissa Brown MSN, RN, PMHCNS-BC
CACNS Affiliate

Megan Siebert MSN, AGCNS-BC, PCCN
Clinical Nurse Specialist Community Hospital South
Indianapolis, Indiana
Central Indiana Affiliate

Heather Cuevas PhD, RN, ANCS-BC, FCNSI
Assistant Professor
The University of Texas at Austin School of Nursing, Austin, Texas
Texas Affiliate

NACNS Board Liaisons:

Susan Dresser PhD, APRN-CNS, CCRN, FCNS

Cherrie Pullium DNP, APRN, ACNS-BC, FCNS

Jan Powers PhD, RN, CCNS, CCRN, NE-BC, FCCM

Phyllis Whitehead PhD, APRN/CNS, PMGT-BC, FNAP, FAAN

Table of Contents

Organization.....	6
Affiliate Definition...	6
Benefits as an NACNS Affiliate.....	6
Benefit of affiliation to NACNS.....	6
To establish a new NACNS Affiliate.....	7
Work of an Affiliate / Purpose of an Affiliate.....	8
Bylaws	8
Charter	9
In-active Status.....	10
Closing an Affiliate.....	10
Merging Affiliates	10
Affiliate Leadership / Governance.....	10
Roles & Responsibilities of Affiliate Leadership / Governing Body.....	11
Roles & Responsibilities of President	12
Roles & Responsibilities of Vice President / President-Elect	12
Roles & Responsibilities of Treasurer	12
Roles & Responsibilities of Secretary	13
Roles & Responsibilities of Legislative Representative.....	13
Roles & Responsibilities of Membership Chair.....	13
Roles & Responsibilities of Social Media Specialist	13
Roles & Responsibilities of Other Formal Affiliate Leaders	13
Ongoing Management.....	13
Affiliate Report	13
Record Maintenance	14
Sustaining Affiliate.....	14
Succession Planning	14
Leadership Inventory / Assessment.....	15
Elections & Voting	16
Terms of Office.....	16
Vacancies.....	16
Resignation.....	16
Dismissal of Leader.....	16
Financial Management.....	16

Affiliate Membership Dues	16
Treasury Information.....	18
State Incorporation of Affiliate.....	18
Obtaining Federal Tax ID	18
Tax Exemption Status of Affiliate.....	19
Membership.....	20
Membership status / application process	20
Termination of membership	20
Benefits of Affiliate Membership	20
Recruitment & Retention	21
Event Planning.....	21
Geographical Challenges	21
Meetings	21
Continuing Education	21
Conferences / Symposia	22
Contracts	22
Communication / Social Media / Marketing.....	22
Affiliate Email	22
Affiliate Website.....	22
Communication with Affiliate Membership	23
Communication via Email.....	23
Social Media	23
Logos	23
Connection	23
With NACNS	23
With other Affiliates	23
Connection with other APRN groups.....	23
APRN Practice / Legislation	23
Other	24
Awards	24
Scholarships.....	24
Appendix A: Charter Template	25
Appendix B: Strategic Plan Template	26
Appendix C: Business Plan Template.....	27



Appendix D: Budget Template..... 28
Appendix E: Conference Planning Checklist Template 29
Appendix F: Conference Budget Planning Template 30

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
Organization		
Affiliate Definition	<p>An organization comprised of Clinical Nurse Specialists (CNSs) and CNS students residing in a defined geographical area may be affiliated with the NACNS, if the group meets criteria for affiliation as established by the Association. All groups that fulfill the criteria for affiliation are referred to as “affiliated with NACNS”, and will be listed on the NACNS website as an Affiliate.</p> <p>NACNS provides the opportunity for state-level and regional common interest groups to become NACNS Affiliates. NACNS Affiliates must be independent organizations that have mission and goals similar to NACNS.</p> <p>NACNS Affiliates are not in a chapter relationship with NACNS.</p> <p>Q. What’s the difference between a chapter and an affiliate? A. An affiliate is a separate legal entity that is associated with the national organization through an affiliation partnership. A chapter is more closely associated with the parent organization through membership connection, dues and responsibilities.</p>	
Benefits as an NACNS Affiliate	<ul style="list-style-type: none"> • Become visibly linked to the national organization • Gain the benefit of NACNS resources • Gain opportunities to influence the positions, activities, and resources of NACNS • Link your local CNSs to all CNSs in the United States and internationally • Market your affiliate groups’ accomplishments in the CNS Journal and NACNS Newsletter • Networking with other Affiliates in support of advancing CNS visibility and value • There is no fee for affiliation with NACNS 	
Benefit of affiliation to NACNS:	<ul style="list-style-type: none"> • Increase the organization’s authority to speak to issues of concern to CNSs nationwide • Enhance the national organization’s ability to target services and programs needed by affiliates and their members • Helps NACNS identify qualified CNSs for national leadership positions 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> Allows the organization to gather quick assessments of how member’s perspectives stand on emerging issues/challenges for the CNS practice, such as practice regulation 	
<p>To establish a new NACNS Affiliate</p>	<p>Requirements to become an Affiliate:</p> <p>Q. Do you need a minimum number of members to become an Affiliate?</p> <p>A. No. However, you should have a good number who can collaborate together to develop and grow the Affiliate. A minimum of ten is a good starting point.</p> <ul style="list-style-type: none"> At least fifty percent (50%) of the group’s members or greater than 100 members are members of NACNS <p>Q. How do we gather an interested group of CNSs to become an Affiliate?</p> <p>A. Reach out to your State Board of Nursing (BON) and request a contact list of CNSs in your state. You may be able to purchase a contact list for minimal cost. You can then reach out to the CNSs in your state or area to determine level of interest and market your initial activities. Not all BON share or sell contact information. Other options would be to reach out to area colleges of nursing that offer a CNS program and local hospitals that employ CNSs to market the potential development of an affiliate. Networking with CNS colleagues during annual NACNS conference affiliate session, is another great way to connect.</p> <p>Q: Does the Affiliate pay dues or an application fee to NACNS to be a state affiliate?</p> <p>A: No</p> <p>Application Process:</p> <ul style="list-style-type: none"> Reach out to the Affiliate Advisory Committee (AAC) regarding your interest in becoming an affiliate. The Affiliate Advisory committee will provide support and advisement to the potential affiliate for the submission process. Complete Affiliate application and submit to affiliate advisory committee. <ul style="list-style-type: none"> - Include a roster of participants. Identify number who are NACNS members. - Include a brief description of the proposed activities of the group for the next year and any recent past activities. - Include bylaws and charter if created. (See bylaws and charter section for more information.) 	<p>NACNS Bylaws provide for the establishment of Affiliates.</p> <p>NACNS Bylaws are found on the NACNS website – About Us – Organizational Documents</p> <p>Link to Affiliate Application Packet: https://nacns.org/wp-content/uploads/2021/01/AffiliatePacket-fillable.pdf</p> <p>For questions regarding the affiliate process please contact: Affiliate Advisory Committee at affiliates@nacns.org</p>

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • The AAC will provide recommendation to the NACNS board for approval of the creation of the affiliate. • Once approved by the NACNS Board, the new Affiliate and NACNS will have entered into an agreement of affiliation. • NACNS Affiliate Logo may then be used by the Affiliate to designate to others that they are an Affiliate of NACNS. 	
Work of an Affiliate / Purpose of an Affiliate	<ul style="list-style-type: none"> • Purpose of an affiliate is: <ul style="list-style-type: none"> - To serve as the state or regional leader and voice of the CNS - To align with and promote the work NACNS <ol style="list-style-type: none"> 1. Promote the full scope of practice of the CNS 2. Serve as a leader for CNS education 3. Promote the benefit the CNS brings to evidence-based quality, patient safety, and cost of healthcare delivery. 4. Promote CNS research in order to further define the value of CNS interventions. • Provide CNSs an opportunity for professional development and professional socialization at a local and regional level <ul style="list-style-type: none"> - Educational offerings - Foster scholarly work and implementation of evidence-based practice - Outlet for dissemination of CNS work • Collaborate with national and specialty nursing organizations, hospitals, colleges and universities, and government agencies to advocate for CNS practice. • CNS collaboration on / work on moving APRN / CNS legislation forward • Support for CNS student preceptor/mentoring entry into practice 	See Resources from Legislative/Regulatory Committee found on the Legislative / Regulatory Committee page of the NACNS website
Bylaws	<p>Bylaws provide the organizational structure in the form of guiding principles and rules that define the functionality and purpose of the organization.</p> <p>Q. Does an Affiliate need Bylaws?</p> <p>A. Official bylaws are not required for affiliation with NACNS, but are recommended. If created, submit to NACNS for review.</p> <p>Q. How do I create Bylaws?</p>	http://www.nacns.org/wp-content/uploads/2016/11/ByLawsTemplate.pdf

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<p>A. Formatted by using Articles and Sections. Articles being the chapter heading with the Sections being the sub-headings.</p> <p>Q. What needs to be included in the bylaws?</p> <p>A. Name and purpose of the organization Membership Officers and decision-making General, special, and annual meetings Board roles and responsibilities including length of service State of incorporation may have additional requirements</p> <p>Q. Approval Process?</p> <p>A. Bylaws are approved by the leadership of the affiliate. Recommend input and feedback from membership. May include membership in the approval process. Submit to NACNS annually for review.</p> <p>Q. How often reviewed/revised?</p> <p>A. Every 1, 2 or 3 years based on term limits of board members. May consider revision when undergoing change in purpose, organizational structure, or process.</p> <p>Q. Who reviews/revises?</p> <p>A. Bylaws are reviewed by your affiliate’s leadership or designee</p>	
Charter	<p>Q. What is the difference between charter and bylaws?</p> <p>A. A charter is a document defining the affiliates existence and purpose. Bylaws are the rules and regulations established by the organization to regulate the actions of members and guide its operation.</p> <p>Q. What needs to be included in a charter?</p> <p>A. Purpose and function of an affiliate. State of incorporation may have additional requirements</p> <p>Q. Approval Process?</p> <p>A. An Affiliate charter is approved by the leadership of the affiliate. Recommend input and feedback from membership. May include membership in the approval process.</p> <p>Q. How often reviewed/revised?</p> <p>A. Every 1, 2 or 3 years based on term limits of board members. May consider revision when undergoing change in purpose, organizational structure or process.</p> <p>Q. Who reviews/revises?</p>	Appendix A: Charter Template

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
Inactive Status	<p>A. An Affiliate’s charter is reviewed by your affiliate’s leadership or designee</p> <p>Affiliate Advisory Committee will reach out to Affiliates who have not submitted an Annual report to determine ways to support the Affiliate in completion of the report or other needed next steps. Inability to resolve report out and / or non-communication from the Affiliate will result in being placed on Inactive status.</p>	
Closing an Affiliate	<p>There may be times due to lack of membership or interest where an affiliate might consider dissolving the affiliate.</p> <p>Things to consider prior to dissolution:</p> <ul style="list-style-type: none"> ● What is the root cause of lack of interest? Is it reversible? ● Potential to merge with another affiliate? ● Financial accounts: <ul style="list-style-type: none"> Review open accounts Determine disposition of monies (May be predetermined in Bylaws or in Articles of Incorporation) <ul style="list-style-type: none"> - Donation to another nonprofit, such as the NACNS CNS Institute - Merge monies with other affiliate merging with Close accounts ● Notify NACNS of change in status 	<p>This website may be helpful:</p> <p>Dissolving a Nonprofit Corporation National Council of Nonprofits</p>
Merging Affiliates	<p>Things to consider when merging Affiliates:</p> <ul style="list-style-type: none"> ● Leadership of each Affiliate meet together to discuss potential of merger ● Discussion and feedback from each Affiliates membership ● Recommend a vote on merging affiliates by each Affiliates membership <p>Things to consider once decide and confirm to merge:</p> <ul style="list-style-type: none"> ● Does one remain open, and the other one closes? ● Name change for the new merged affiliate? ● Or keep name of one Affiliate and dissolve the other? ● Review / Revise Bylaws, Charter <p>Do:</p> <ul style="list-style-type: none"> ● Submit an affiliation agreement with NACNS 	<p>Link to the Affiliate Agreement Document is found on the Affiliates Page: Go to NACNS – Connect – NACNS Affiliates</p> <p>For questions regarding the affiliate process please contact: Affiliate Advisory Committee at affiliates@nacns.org</p>

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
<p>Affiliate Leadership / Governance</p>	<p>Note: Determined Roles & general responsibilities should be outlined in the Bylaws, if used.</p> <p>Possible Leadership roles to consider:</p> <p>Note: Roles & Responsibilities are outlined in Bylaws if used.</p> <ul style="list-style-type: none"> • President • Vice-President or President- elect • Immediate past president (this role supports the newly appointed president) • Treasurer • Secretary • Board Members / Planning Committee • Legislative Representative • Membership Chair • Webmaster / Social Media Specialist • NACNS Liaison • Other roles as determined by the Affiliate Board • Student representative (A current CNS student) <p>Get creative based on needs. May consider combining roles and responsibilities.</p> <p>Q. What roles do we have to have?</p> <p>A. Recommended foundation of leader roles would be: President, Treasurer & Secretary.</p> <p>- It is recommend that Affiliate Leadership be members of NACNS</p>	
<p>Role & Responsibilities of Affiliate Leadership Team / Governing Body</p>	<p>The Affiliate determines the term used for their Leadership Team / Governing Body. If Bylaws are used, this should be described there.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Board or Executive Board • Steering Committee <p>Leadership Teams / Governing Bodies generally include:</p> <ul style="list-style-type: none"> • Elected positions generally include President, Vice President, Secretary, and Treasurer. • Appointed positions, such as committee chair positions, comprise the rest of the board of the affiliate. <p>The Leadership Team / Governing Body:</p>	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • Submit proposals for the annual report to include: <ul style="list-style-type: none"> ○ A summary of yearly activities of the affiliates goal, including outcomes ○ Proposed revisions to any goals for next year ○ Evaluations of affiliate activities • Board holds decision making authority for the affiliate • Establishes collaboration with colleges and universities <p>A Planning Committee: Could be the same as the Leadership Team / Governing Body or a separate committee.</p> <ul style="list-style-type: none"> • Organizes social and educational events for members • Provides oversight and guidance for annual conferences • Sets up event budget and works with Treasurer • Maintains credentialing and documents pertaining to lecturers, including continuing education activities 	
<p>Role & Responsibilities of President</p>	<ul style="list-style-type: none"> • The President shall be given the powers of supervision and management pertaining to office • Preside over all meetings of general membership, executive board, and any ad hoc boards (created) meetings pertaining to affiliate, unless otherwise specified in affiliate bylaws • Collaborate with secretary for meeting preparation • Mentors member involvement in the affiliate • Monitors and maintains correspondence through designated affiliate email account • Primary affiliate point of contact for NACNS • Champion advancement toward strategic plan goals • Shall perform other duties as assigned by bylaws and/or policies of the affiliate 	
<p>Role & Responsibilities of Vice President or President-elect</p>	<ul style="list-style-type: none"> • Maintains working knowledge of all affiliate activities • The Vice President/President-elect will assume the duties of the President in his/her absence and may assist with duties in the absence of the Secretary if indicated at general membership and executive board meetings, unless otherwise specified in affiliate bylaws • Coordinates all general membership meetings. Plans or delegates planning of events for members outside of general membership meetings 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • If President-elect: prepares to assume President role at the conclusion of the current President's term. 	
Role & Responsibilities of Treasurer	<ul style="list-style-type: none"> • Receives all funds belonging to Affiliate and maintains bank account • Maintains records of all dues, funds, receipts, donations, and expenditures • Processes payments for board activities, conference related activities • Balances accounts monthly and provides an itemized report of expenditures, collections, and cash balances to the Affiliate Leadership Team / Governing Body and provides the information at the general membership meetings • Files all appropriate tax forms in accordance with state and federal laws 	
Role & Responsibilities of Secretary	<ul style="list-style-type: none"> • Records and distributes the minutes of all regular and special membership meetings and maintains a separate record of all motions which have been adopted • Maintains a current membership list of all officers, chairs of any additional ad hoc or sub committees, and role/position descriptions for those positions and distributes them to the Affiliate Leadership Team / Governing Body • If Affiliate has a mailing address and/or PO Box, the secretary will pick up all mailed items to distribute to appropriate members prior to membership meetings unless otherwise designated by Affiliate procedures • May include elements listed in Membership Chair role 	
Role & Responsibilities of Legislative Representative	<ul style="list-style-type: none"> • Chairs Affiliate sub workgroup on legislative/regulatory actions • Provides reports to Affiliate regarding status of state legislation regarding APRN / CNS practice. • Liaison between Affiliate and other local/ regional APRN groups working APRN / CNS legislation. 	
Roles & Responsibilities of Membership Chair	<ul style="list-style-type: none"> • Maintains Membership list • Maintains record of Affiliate members with dual membership in NACNS • Strategize on ways to increase membership 	
Roles & Responsibilities of Social Media Specialist	<ul style="list-style-type: none"> • Maintains the social media platforms of the Affiliate including website • Takes lead in marketing the Affiliate and Affiliate activities to meet goals of the Affiliate and NACNS. 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
Role & Responsibilities of "Other Formal Affiliate Leaders"	Develop as needed based on needs	
Ongoing Management		
Affiliate Report	Communication with NACNS formally <ul style="list-style-type: none"> • Affiliate annual reports shall be submitted by January 31, or designated time to the Association Secretary / Treasurer (note how this has changed to submission on line • Submit affiliate membership roster by January 31 with annual report • Ensure current president or official designee is a member of NACNS 	Link to annual report: https://nacns.org/connect/nacns-affiliates/affiliate-annual-report/
Record Maintenance	Q. What documents to maintain? A. Membership records Financial records (including banking records and tax filings) Board / Leadership / Planning Committee Agendas and meeting minutes Continuing education records Bylaws (including previous versions) Articles of incorporation Q. How long should these records be kept for? A. Rule of thumb 7 years except for bylaws, minutes with actions / motions, and articles of incorporation which are recommended to maintain in perpetuity. Follow the laws and rules in your state of incorporation.	
Sustaining Affiliate	Ideas: <ul style="list-style-type: none"> • Develop a Strategic Plan to provide direction of the organization. Include goals such as number of activities, number of members, etc. • Connect with academic CNS programs within the Affiliate's region • Provide credit for practicum hours to attend a meeting of the Affiliate • Involve CNS students in activities and work of the Affiliate • Provide avenues for coaching and mentoring • Promote professional socialization 	Appendix B: Strategic Plan Template

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • Tier membership dues to promote membership from groups in your region (students, retired CNS, etc.) • Survey of members to determine barriers to cost to join 	
<p>Succession Planning</p>	<p>Q. How recruit members to Leadership roles within the Affiliate? A. Coaching / Mentoring within Affiliate for individuals interested in taking on a leadership role.</p> <ul style="list-style-type: none"> - Shadowing experience such as participation in leadership meetings / calls - Virtual one-on-one sessions - Recruit during annual Affiliate conferences and NACNS conference <p>Encourage members to take on leadership role within affiliate to gain experience in these types of leadership roles as part of their professional development</p> <p>Ideas:</p> <ul style="list-style-type: none"> - Develop a handoff / transition process <p>Mentorship/Coaching with another Affiliate Leadership</p>	
<p>Leadership Inventory / Assessment</p>	<p>Consider surveying your membership regarding existing leadership skills and skills they would like to develop or gain experience in doing.</p> <p>Provide coaching and mentoring opportunities to help CNS membership develop professionally in leadership roles.</p> <p>Offer learning opportunities that address leadership competencies.</p> <p>Such as:</p> <ul style="list-style-type: none"> • How to lead a meeting • Managing your email • Crucial Conversations • How to program plan for continuing education • Strategic Planning • Budgeting / organizational money management 	<p>Tools for leadership assessment:</p> <p>Search for:</p> <ul style="list-style-type: none"> - 16 personalities - Leadership Framework Self -Assessment tool
<p>Elections & Voting</p>	<ul style="list-style-type: none"> • Nominations- <ul style="list-style-type: none"> ○ Any member in good standing is able to run for office within the executive board. Nominations from the floor of the general membership meeting will be accepted prior to the vote unless otherwise specified by Affiliate bylaws or procedures. 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> ○ The Nominating committee, if used, will submit a slate of qualified candidates, by consensus, to the executive board each expiring term. ○ For Affiliates without a Nominating Committee: the Executive Board shall set the deadline for submitting nominations and shall ensure nominees are qualified candidates who accept the nomination. ● Voting- <ul style="list-style-type: none"> ○ Membership must be current to vote ○ Each member will count as one vote ○ Forms of voting could be written or electronic format and must be recoverable in the event of a disputed election. ● Quorum- <ul style="list-style-type: none"> ○ A two thirds (2/3) majority of the membership vote shall qualify for quorum at any general membership meeting unless otherwise specified in the affiliate’s bylaws. ○ If writing bylaws, consider ease or difficulty of attaining quorum, as well as importance of item under consideration when setting a quorum number or percentage. Example: dissolving Affiliate carries greater weight than approving a single incident of non-budgeted spending; Affiliates may choose to require a higher quorum vote for more significant decisions. 	
Terms of Office	<ul style="list-style-type: none"> ● Each term of office may vary per state/region; recommendation either 1, 2, or 3 years. ● No individual may serve more than one officer position at a time. ● The Affiliate Leadership Team / Governing Body must meet at minimum of 3 times per year unless otherwise specified in the affiliate’s bylaws. ● Consider off-setting elections so not the board doesn’t change at the same time. 	
Vacancies	<p>Q. What to do if someone steps down?</p> <p>A. Follow Affiliate bylaws; consider "any vacancy for office can be temporarily filled by 75% vote of the board."</p>	
Resignation	<ul style="list-style-type: none"> ● Any board member at any time may give written notice to the President, Secretary, or Affiliate Leadership Team / Governing Body, as specified in the Affiliate’s bylaws. ● The acceptance of the resignation is not necessary for the resignation to go into effect 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
Dismissal of Leadership member	<ul style="list-style-type: none"> Resignation will be immediate upon receiving written notice Follow Affiliate bylaws; consider “Any director may be removed for just cause or membership change status by 75% vote of the board.” Recommend: The director in question of removal will recuse themselves from any vote pertaining to his/ her own removal. 	
Financial Management		
Affiliate Membership - Dues	<p>Q. How do you determine how much to charge for dues? A. Each Affiliate sets their individual dues. Things to consider:</p> <ul style="list-style-type: none"> The amount of money needed to operate the Affiliate and provide desired programs The number of members The ability to support operations and programs by other means than dues The value to the member. Do they feel they are getting a good value/return on membership? Tiered dues structure based on membership type Length of membership status (yearly, every 2 years, is there a discount for multiple years paid with dues) Dues tiered to Membership type Discounts <ul style="list-style-type: none"> Military discount NACNS member discount Student discount Retired CNS discount <p>Q. When do you review and determine to increase dues? A. Things to consider:</p> <ul style="list-style-type: none"> How are your financials trending? Is more going out than coming in? <p>Q. When to charge for dues? A. Some possibilities:</p> <ul style="list-style-type: none"> Membership dues due based on start of year, either calendar or fiscal. Renewal with dues at special time of year that coordinates with CNS week or a conference. 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> - Does membership year start when individual becomes a member? And thereby each member has their unique on roll of membership date? - Or do all members renew annually based on predetermined date? - If based on a predetermined date, consider discounts for partial year or free access to membership for a remaining portion of the year till next annual dues due date. <p>Other possibilities to consider:</p> <ul style="list-style-type: none"> - Any discounts for a new member who has recently moved and was a member of another Affiliate 	
Treasury information	<p>A Business Plan can be used to support the growth of an organization. It may be needed when seeking funding.</p> <p>Budget management: managing the financial I&O's</p> <ul style="list-style-type: none"> - Ins: Revenue ---- Operating Income <ul style="list-style-type: none"> Membership dues Program charges - Outs: Expenses <ul style="list-style-type: none"> Mailbox Website Food for meetings <p>Check requests</p> <p>Banking information</p> <ul style="list-style-type: none"> • Checking • Savings Account • What does banking institution require to set up signatory authority for access to accounts? <ul style="list-style-type: none"> - Who can / needs to sign checks - Ensure signatory authority is handed off with leadership role transition • Credit or debit card access / use – create process / procedure for use, reimbursement, removal of board from accounts when term concludes. <p>Payment Platforms</p> <ul style="list-style-type: none"> • Square / Tile • Venmo / CashApp / Paypal 	<p>Appendix C: Business Plan Template</p> <p>Appendix D: Budget Template</p>

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
State Incorporation of Affiliate	<ul style="list-style-type: none"> • Varies state-to-state • Refers to obtaining a registration to do business within the state. • Each Affiliate determines best status. Some to consider: Non-profit, limited liability company. <ul style="list-style-type: none"> ○ If planning to apply for tax-exempt status, must be non-profit. 	
Obtaining Federal Tax ID	<ul style="list-style-type: none"> • If the Affiliate chooses an incorporation status requiring corporate or tax-exempt tax status, a Federal Tax ID, formally called an Employer Identification Number or EIN, is required. • Federal Tax ID is a “social security number” for a business. • You will also need an EIN to open a bank account. 	https://www.irs.gov/filing NOTE: This general webpage links to further sites for applying for a business (corporation / LLC) EIN OR to a charity / nonprofit EIN.
Tax-exemption status of Affiliate	<p>To apply or not to apply for tax-exempt status is determined by each Affiliate. By meeting the qualifications, a nonprofit institution is allowed to avoid paying federal taxes on their earnings. Section 501(c) is the portion of the US Internal Revenue Code that allows for federal tax exemption of nonprofit organizations.</p> <ul style="list-style-type: none"> • 501c3 is the most common exemption organization type created for the purpose of charitable, educational, scientific, religious, literary, or public safety. • 501c6 is another common exemption type - an association of persons having some common business interest, the purpose of which is to promote such common interest and not to engage in a regular business of a kind ordinarily carried on for profit. <p>There are many similarities and some notable differences between 501c3 and 501c6</p> <ul style="list-style-type: none"> • 501c3 donors can use their contributions as a tax deduction. The majority of other tax codes don’t provide this benefit; so many organizations choose to apply for a 501c3 status because it’s appealing to donors, whom they rely on to fund their activities. • 501c6 cannot offer tax-deductible donations but for members who personally file taxes including business expenses, membership fees can be tax-deductible as a business expense. • 501c3 cannot engage in political activity, including formal support of a candidate or lobbying. 	Recommend reviewing IRS website and law sites comparing 501c3 with 501c6

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • 501c6 is allowed to engage in political activities as long as organization funds spent on such activities are reported to members annually. <p>The IRS requires that nonprofit organizations meet specific requirements before earning tax-exempt status.</p> <p>Basic essentials include:</p> <ul style="list-style-type: none"> • Avoid any purpose that praises or calls for discrimination; • Must have obtained an official status as an association, corporation, or trust; • Provide a reason for their desire to seek tax exemption; • Three-years of existence before applying; • Earnings and funds raised by the outlet can't benefit a sole member; <p>Applying for 501c3 tax status (always confirm on IRS.gov website prior to filing):</p> <ul style="list-style-type: none"> • Complete and submit Form 1023 OR Form 1023-EZ • Submit application form with required fee (can be up to \$600) <p>Applying for 501c6 tax status (always confirm on IRS.gov website prior to filing):</p> <ul style="list-style-type: none"> • Complete and submit Form 1024 AND form 8718 • Submit application form with required fee (\$600) 	
Membership		
<p>Membership status / application process</p>	<p>Things to consider:</p> <ul style="list-style-type: none"> - Application process - Who monitors membership - What happens if member does not renew- follow-up - Membership types. Create based on the needs of Affiliate <p>Examples: Affiliate Member, Student, Retired, Friend of NACNS, Military Member</p> <ul style="list-style-type: none"> - Correlate Membership type with dues 	<p>Example: CIOCNS has 3 membership tiers:</p> <ul style="list-style-type: none"> • NACNS Member, • Non-NACNS member • Student member
<p>Termination of membership</p>	<p>Suggestions: Process should be outlined in Bylaws or Affiliate procedures</p> <ul style="list-style-type: none"> • Expiration of dues / nonpayment of dues • Advanced written notice • 75% approval vote of Affiliate Leadership Team / Governing Body to terminate membership of an individual 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
Benefits of Affiliate Membership	<p>Getting members engaged and involved within local CNS community</p> <p>Professional Development</p> <ul style="list-style-type: none"> • Leadership opportunities via elected role or committee member participation • Dissemination of scholarly work and evidence based practice initiatives • Mentoring through Affiliate • Preceptor Resources <p>Professional Socialization</p> <ul style="list-style-type: none"> • Access to members only section of Affiliate website (password protected) • Access to social media accounts for NACNS/State Affiliate (password protected) • Access to job postings <p>Discounts:</p> <ul style="list-style-type: none"> • Consider offering discounts to members for regular meetings or annual conferences. • How many meetings on a yearly basis? Attend X number of meetings, savings should equate to more than your membership 	
Recruitment & Retention	<p>Ideas:</p> <ul style="list-style-type: none"> • Recruitment-Trial period perhaps 2 meetings before full membership dues are due • Retention-Referring a friend of an existing member, existing member receives a discount of 1-2 months of dues upon renewal if friend becomes active member • Collaboration with local Colleges of Nursing with CNS programs <ul style="list-style-type: none"> • Suggest recommendation for CNS students to attend / participate in the local Affiliate • Discount to Affiliate if NACNS member 	
Event Planning		
Geographical Challenges	<p>Consider:</p> <ul style="list-style-type: none"> • Making use of virtual platforms (zoom, Microsoft teams, WebEx) • Making use of social media for connection • Plan in-person meetings / events in different parts of the Affiliate coverage area 	
Meetings	<p>Consider:</p> <ul style="list-style-type: none"> • Types of meetings: Electronic / Virtual vs In-person • How members will be notified of Meetings 	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	<ul style="list-style-type: none"> • What needs to be voted on and if have a quorum • Maintaining meeting minutes / agendas • Having a mechanism to share information with membership post meeting • Using Parliamentary Procedure 	
Continuing Education	<p>How to assess members learning needs:</p> <ul style="list-style-type: none"> • Survey • Trends in member conversations, voiced requests • Feedback from members after events as to what they would like • Feedback from members as to what would bring them to attend an event • Trends in literature, current events • Recommend offering Pharmacology Continuing Education <p>Obtaining Continuing Education (CE) approval</p> <ul style="list-style-type: none"> • Reach out to members of Affiliate to determine if any are a Nurse Planner with an approved provider of CE. Determine if able to obtain CE from that approved provider by having that organization being a co-sponsor of the event. • Reach out to the state Nurses Association to apply and maintain provider status <p>Note: Follow the CE provider’s guidelines regarding Vendors.</p>	
Conferences/ Symposia	<p>Things to consider:</p> <p>Venue Food Speaker Budget</p> <ul style="list-style-type: none"> • What to charge attendees • What to charge vendors / sponsors • Consider charging enough to cover costs of event as well as to fund other Affiliate activities such as other events or student scholarships • Speaker fees/honorarium <p>Sponsors / Vendor Support</p>	<p>Appendix E: Conference Planning Checklist Template</p> <p>Appendix F: Conference Budget Planning Template</p>
Contracts	<p>When obtaining venues for events and obtaining catering, there are often times contracts involved. Venues may also require liability contract. Read contract carefully to ensure agreement with terms. Recommended that minimally the President and</p>	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	Treasurer sign the contract. Maintain copies of signed contracts with Affiliate records. Consider creating formal Affiliate procedure for contract management.	
Communication/Social Media/ Marketing		
Affiliate Email	Consider having a group email that can be used as a general contact for the Affiliate <ul style="list-style-type: none"> • Make sure to handoff access to standard email when transitioning Leadership team members so that email communication can be maintained. 	NACNS provides a generic affiliate email May develop own
Affiliate Website	Possible Items include: <ul style="list-style-type: none"> • Leadership Roles • Ways to connect in with other leadership roles at NACNS/or state to state to affiliates • Connectivity with other members of the affiliate, such as a members' directory • Link to NACNS Affiliate page 	
Communication with Affiliate Membership	Consider: <ul style="list-style-type: none"> • Use of multiple methods; email, Facebook, Twitter, LinkedIn 	
Communication via Email	Consider: <ul style="list-style-type: none"> • Ask members for personal emails for communication • Beware that some email communication via institution emails may be blocked by firewalls • Provide ways to access information being shared via other means • Use of Google Documents (some organizations may block) • Provide means for "opt out" or removal from affiliate email distribution list 	
Social Media	<ul style="list-style-type: none"> • Post information regarding upcoming events • Post CNS accomplishments such as NACNS awards, presentations, etc. • Track site visits • Track how many go from Facebook page to Affiliate website 	Search links for NACNS and Affiliate on <ul style="list-style-type: none"> • Facebook • Twitter • Instagram • LinkedIn
Logos	Consider creating a unique logo for Affiliate Note: The NACNS logo is for the National organization use only	

NACNS Affiliate Toolkit

Topic	Information/ FAQs / Ideas / Things to Consider	Resources & Links
	Once approved as an Affiliate may use the NACNS Affiliate Logo	
Connection		
With NACNS	The Affiliate President is invited to the quarterly Affiliate virtual meeting with NACNS leadership and other Affiliates across the nation.	
With other Affiliates	Mentorship, consultation, liaison, share best practices Attend other Affiliate CE offerings Request speakers from other Affiliates to present at your Affiliate event	Affiliate webpage Affiliate Listserv NACNS Communique'
Connection with other APRN groups	Consider: <ul style="list-style-type: none"> Affiliate Members who are also members of other APRN groups report to Affiliate the work of the APRN group, and share affiliate information with the APRN group - Serve as a Liaison 	
APRN Practice / Legislation	Consider having an Affiliate member who leads and reports out state / regional and notable national Legislative/Regulatory activities.	Legislative/Regulatory committee site: https://nacns.org/about-us/committees/#legislative-regulatory
Other		
Awards	NACNS recognizes an Affiliate of the year at the annual NACNS conference in March. Applications are due in October. The purpose of the award is to recognize an Affiliate's outstanding efforts in support of the NACNS mission and strategic goals at the local level.	NACNS Affiliate Award information: https://nacns.org/career-education/awards/nacns-affiliate-of-the-year-award/
Scholarships	Consider offering scholarships such as: <ul style="list-style-type: none"> Scholarship to NANCS conference 	

Appendix A: Charter Template

Affiliate Logo	Affiliate Name
	Charter

Definition of group/ Preamble:

Purpose:

Mission:

Membership:

Responsibility of Members:

Reporting Structure:

Affiliate Leadership Team / Governing Body (Insert chosen name):

List out:

Position names

Terms of office

Responsibilities

Affiliate Committees

List out committee names and responsibilities

Election Process

Resignation Process or Policy

Meetings

How often

Purpose / General Agenda

Quorum

Rules of Order

Charter Approval Process

Amendments

NACNS Affiliate Toolkit

Appendix B: Strategic Plan Template

Affiliate Logo

Affiliate Name

Strategic Plan

Date developed

Date Range for Plan

Mission

Vision

Goals / Objectives

Goals	Initiatives Plan	Outcome Measures / Key Metrics	Current Status	Outcome Goal
Membership Growth				
Student Involvement				
Succession Planning / Election Process				
Programming				
Financial				

NACNS Affiliate Toolkit

Appendix C: Business Plan Template

Affiliate Logo

Affiliate Name

Business Plan

Executive Summary

Name and location

Purpose of organization

Mission and vision statements

Purpose of the business plan

Contents of
Business plan will
depend on need.

Affiliate description

Legal structure

Brief history

Overview of Affiliate activities

Highlights of growth

Summary of short and long term goals

NACNS Affiliate Toolkit

Appendix D: Budget Template

Affiliate Logo

Affiliate Name

Budget Templates

Monies received IN	Budgeted	Actual Cost	
Membership dues			
Meeting fees / payments for food			
Program fees			
			Total IN:

Expenses OUT	Budgeted	Actual Cost	
Post office Box			
Website			
Food for meetings			
			Total OUT:

Monthly Summary			
Total IN	Total OUT	Difference	Account Balance

Expense Tracker			
		Starting Balance →	
Date	Description	Amount	Remaining

NACNS Affiliate Toolkit

Appendix E: Conference Planning Checklist Template

Affiliate Logo

Affiliate Name

Conference Planning Checklist

To Do's	Who Responsible	Timeline	Status
Venue			
Catering			
AV			
Speakers			
Posters			
CE application			
Slides			
Handouts / Printing			
Save the Date			
Flyer			
Posting to website / social media			
Giveaways Raffles			
Registration			
Vendors			

NACNS Affiliate Toolkit

Appendix F: Conference Budget Planning Template

Affiliate Logo

Affiliate Name

Conference Budget Planning Template

Expenses		Budgeted	Actual Cost
Venue	Room Cost: Room size:		
Catering			
- Breakfast			
- Coffee Service			
- Lunch			
- Snacks			
AV Equipment	Screen: Projector: Computer: Mics: Sound Patch: AV person:		
Registration Space			
Vendor Space			
Poster Space			
Parking			
Speakers Honorariums			
Speakers Travel	Flight: Hotel:		
Giveaways Raffles			
Handouts / printing			
CE application			

Revenue		Budgeted	Actual intake
Vendor	Charge for tables Received as a sponsorship		
Participant fees	Talley up expected cost of program divide by number of expected participants to determine break even cost. Additional considerations is if this is a money making event to cover operational expenses or raise money for scholarships. Or is the goal simply to break even.		