



AMBUCS
CHAPTER
TOOLKIT

CONTENTS

Overview	3
Chapter Requirements	3
AMBUCS Nationwide Programs	4
Amtryke Program	4
Scholarships for Therapists Program	7
Other Community Service	8
Program Giving	8
Amtryke Giving	8
Scholarships for Therapists Giving	9
Cornerstone Giving	10
100% Program Giving	11
Branding	11
Membership Development	13
Give Everyone a Job	13
Big Hat Club	15
Regional Training Conference	15
AMBUCS National Conference	15
Chapter Revitalization Case Study	16
AMBUCS University	19
Marketing Your Chapter	19
Website	19
Social Media	20
Media Relations	20
Print Materials	21
Fundraising	22
Types of Donors	22
Crowdfunding	25
Steps to Success	26
Governance	28
AMBUCS Group Tax Exemption	28
Check with IRS.gov	28

Proving Your Tax Status	29
Sales Tax Exemptions	29
Annual Reporting	30
Charitable Registration in States	31
Risk Management	31
Big Hat Club Status	32
Gaming Laws	32
Governance Conclusions	33
AMBUCS Officer Guidelines.....	33
Executive Board	33
Chapter President	37
Chapter Secretary	39
Chapter Treasurer	45
Your Path to the National Presidency	51

PLEASE NOTE: Past this point in the Chapter Toolkit, all **red links** will skip to the relevant portion within this document and all **blue links** will link to a webpage outside of this document.

OVERVIEW

AMBUCS began life as American Business Clubs, a civic membership organization dedicated to helping people with disabilities in 1922. We shortened it to AMBUCS (pronounced AM- BUCKS) in 1961 as a part of a rebranding campaign.

In the mid-1990s we started making and giving away adaptive tricycles as a national project. Just to keep everyone confused we called both the trykes and the company that makes them, Amtryke. Amtryke®, LLC is fully owned by National AMBUCS™, Inc.

Through the years our model transformed to the extent that we changed our tax status from a 501c4 (service club) to a 501c3 (public charity) in 1996.

AMBUCS now has around 5,000 members in more than 160 chapters in over 35 states. Our members work on a grassroots level to fulfill our mission statement:

Inspiring people to conquer challenges related to mobility and independence, through a nationwide network of volunteer chapters, working in partnership with physical, occupational and speech therapists; by providing Amtryke adaptive trykes, scholarships for therapists and many forms of community service.

The Amtryke adaptive tricycle program is one of the main ways we do that. Our members fundraise for and give away about 3,500 Amtrykes each year. AMBUCS chapters and members have also funded over \$8.9 million in educational scholarships for therapists and choose to help their individual communities in a variety of other meaningful ways.

The AMBUCS Resource Center (ARC) in High Point, NC houses a small but dedicated staff working to support the work of our chapters. If you have any questions, please never hesitate to [contact us](#).

CHAPTER REQUIREMENTS

Each chapter can make its own structure and process as elaborate or as lean as you want. There are very few requirements; but these few requirements are truly vital.

AN AMBUCS CHAPTER MUST:

- **Work to inspire people to conquer challenges related to mobility and independence.** Every AMBUCS chapter exists to fulfill the mission, with a high degree of compassion and unimpeachable ethics.
- **Fill out and turn in a 990 to the IRS.** Chapters that make less than \$50,000 per year can simply fill out the e-postcard. Chapters that do not fill out tax forms will lose their charitable status with the IRS. It is very complicated to regain.

- **Maintain your corporate status and [charitable registration with your state](#).** The ARC will file your articles of incorporation and your charitable registration with your state initially. Some states require yearly fees or other maintenance. We can work with you to determine if and what those requirements may be. Your chapter is ultimately responsible for following the rules of your state for maintaining your corporate status and charitable registration.
- **Stay current with your district (if applicable), regional and national dues and invoices.** If your chapter is struggling with this, for whatever reason, please be open with us. Your success is very important to us and we'll do what we can to work with you.
- **Fill out the combined [Form 135/136 - Annual Report and Report of Charitable Giving](#).** We must get this information from you in order to maintain the organization's charitable status. This information also helps us tell the world what a difference we make across the country. We can't brag about you if you don't tell us how awesome you are!

AMBUCS NATIONWIDE PROGRAMS

AMBUCS is all about *Inspiring Mobility & Independence*. Each chapter can choose how best to carry out the mission in their own community.

▶ AMTRYKE PROGRAM

The Amtryke Program is the most popular mission-based project among AMBUCS chapters (over 90%) for good reason. It gives chapter members boundless opportunities to serve and to personally witness lives tangibly changed by chapter fundraising efforts. Chapters who take part in the program have found it to be a great vehicle to gain community support and publicity.

AMTRYKE YEAR. It can seem really intimidating at first but when you break it down, running your chapter Amtryke program is just a three or four step process: Evaluation Day (which will give you your fundraising goal), Fundraising and Tryke Build/Giveaway Day. Your chapter can cycle through this process as many times as you have capacity for. Maybe just once or twice a year or maybe quarterly. Whatever works for your chapter.

10-FOR-10 PROMOTION. Each new AMBUCS chapter is eligible to participate in our 10-for-10 promotion. As you fundraise for and purchase your first trykes as a chapter, the ARC will match each tryke purchased with a free one of equal or lesser value. You do not need to buy all 10 at once and you have up to two years to buy your 10 and get 10 free. Only the tryke (not the adaptations or shipping) is matched. Trykes purchased at trailer or evaluation site pricing are not eligible for 10-for-10.

CHAPTER WISH LIST. Many chapters are unable to fundraise fast enough to keep up with the local demand for Amtrykes. Don't panic, that's totally normal. Most chapters end up keeping their own chapter wish list.

There are several [Required Documents](#) that the recipient's parent/guardian and the recipient's physical or occupational therapist will need to fill out and return to you. You would enter the information on the forms into your database and then fill the wishes as funding becomes available. The Required Documents are updated frequently so please download a new copy at least every 6 months or so.

We strongly recommend that your chapter collects this paperwork from every recipient as a legal precaution (it includes a liability waiver and an image-use waiver). Please also consult our [Improper Sexual Conduct Policy](#) for further risk management tips.

Starting a crowdfunding account may help fund trykes more quickly. Crowdfunding is so effective because it collects small donations from many people and reaches those closest to the rider. (See [Crowdfunding](#).)

In many ways, maintaining a reasonably sized wish list is all about maintaining relationships with your evaluating therapists (whether or not they're members). Feel free to give each evaluator a limit... for instance, "only 3 kids a year, please." Also don't be shy to set criteria, like the child must be unable to safely ride a traditional bike and that the parents are involved and likely to help the child ride frequently.

AMTRYKE PERSON. Please choose one person in your chapter to place all Amtryke orders. This cuts down on a lot of confusion and duplicated orders, etc. This person may also act as the leader of your chapter's Amtryke team. (see [Key Roles](#).)

ORDERING. You can order both Amtrykes and AMBUCS chapter supplies online at www.amtrykestore.org. If you request a chapter login, you can access chapter pricing and (for both Amtryke and AMBUCS orders) request we invoice your chapter rather than paying immediately with credit card (30-day terms).

Or you can order via email (roxannen@ambucs.org) or phone (800-838-1845 x116).

Please provide Amtryke with your **order, name, address, phone, and email address as well as the recipient's name and the address the tryke should be shipped to.**

Existing customers will be asked to verify shipping and billing information to insure proper delivery. When requesting a **quote** be sure to specify that's what you want and provide all the same information. Amtryke/AMBUCS accepts payment via invoice to your chapter (30-day terms), check or credit card: Visa, MasterCard, American Express. Please allow 3 to 5 business days for order processing.

SHIPPING. We ship FedEx Ground unless you ask us, when placing the order, to send it a different way. We can provide expedited shipping at additional cost.

We also do palletized **freight shipping** upon request. Shipping freight can potentially save your

chapter a lot of money. In order to make it worth it, you must order enough bikes to fill a pallet (about 500 lbs. worth...that's about 10-12 small bikes or 6-8 large bikes. [Sizing Chart](#) lists weight.) and you will really want to have access to a loading dock - there's about a \$150 fee if you don't. Does one of your members or a friend of the chapter own a business? They might be willing to let you ship to their dock.

AMTRYKE EVALUATION SITE. Establishing an Evaluation Site is a great way for chapters to identify deserving children or adults who would benefit from an Amtryke. To make a facility an Evaluation Site, the chapter agrees to continually equip the site with current trykes, accessories and training as well as provide trykes to riders who are evaluated by a therapist at the facility. An on-going relationship must be maintained between the chapter and the evaluation site to guarantee success.

There is the [Evaluation Site Guide](#) on our website with full details. Your chapter is responsible for keeping the evaluation site's info up-to-date with the ARC so it is correct on the website.

Evaluation Site pricing is lower than chapter pricing (on trykes and accessories) but there are a few requirements that come along with the reduced pricing. You may only order one model of each tryke for the evaluation site and you cannot reorder that tryke until a new model comes out. Neither the chapter nor the evaluation site may give away trykes you've purchased for the evaluation site until they become obsolete. Evaluation site bikes do not count towards 10-for-10.

AMTRYKE TRAILER. Purchasing and maintaining an Amtryke trailer has become an increasingly popular choice among chapters. Occasionally several chapters in the same region agree to split the cost, maintenance and use of a trailer. This trailer full of trykes and adaptations is a perfect tool on wheels. Use at tryke giveaways, fundraisers, community events, and bike days to introduce a community and therapists to the many models of Amtrykes and the mission of AMBUCS.

Trailer pricing is lower than chapter pricing (for trykes and accessories) but there are a few requirements that come along with the reduced pricing. You may only order one model of each tryke for your trailer and you cannot reorder that tryke until a new model comes out. You may not give away trykes you've purchased for your trailer until they become obsolete. Trailer bikes do not count towards 10-for-10.

AMTRYKE VETERANS INITIATIVE. Chapters can choose to fund trykes for Veterans who cannot operate a traditional bike. Many chapters reach out to their local VA or other Veterans groups to find recipients who would benefit. AMBUCS believes Veterans should have every opportunity to be engaged in the active lifestyle they had prior to their disability. There are [Required Documents](#) designed especially for the Veterans Initiative: one to be filled out by the recipient and two to be filled out by their physical or occupational therapist. We strongly recommend that your chapter collects this paperwork from every recipient as a legal precaution.

AMTRYKE GRANT COORDINATOR. Chapters are encouraged to utilize the grant writer on staff to identify funding sources for your chapter's Amtryke project and to help you submit winning grant proposals. Due to the number of people the grant writer supports, they can give direction, advice and facilitate your efforts but cannot manage the entire process for you.

NATIONAL AMTRYKE WISH LIST. The [National Amtryke Wish List](#) ensures that the Amtryke program is truly a nationwide program. Through the Wish List, individuals with limited financial resources who do not live close to a local AMBUCS chapter can still enjoy the fun and freedom of riding their own Amtryke. There are several [Required Documents](#) that the recipient or recipient's parent/guardian and the recipient's physical or occupational therapist will need to fill out and return to the ARC before rider is placed on the National Wish List. We recommend recipients set up a fundraising page to make the wait time shorter. Donations can then be made by friends, family and other supporters.

▶ SCHOLARSHIPS FOR THERAPISTS PROGRAM

Since 1955, National AMBUCS, Inc. has been awarding scholarships to therapy students. To date, more than \$8.9 million in scholarships have been awarded to over 15,500 students pursuing degrees in **physical therapy, occupational therapy, speech language pathology and hearing audiology**. Please visit the [Scholarship Program](#) page on our website for full details. Particularly the [Information for Chapters](#) link.

NEW: All AMBUCS chapters are encouraged to sponsor one (1) student regardless of whether or not your chapter financially supports the program at this time.

Please limit additional chapter sponsorships to no more than three sponsorships for every \$500 your chapter donates to the Scholarships for Therapists fund. Please be aware that sponsoring a student is much like a nomination, it makes it likely **but not guaranteed** that the student will receive a scholarship. Sponsored students that do not meet the selection criteria will not be considered.

NOTE: A student is not considered chapter sponsored unless a chapter fills out and returns the Chapter-Sponsored Scholarship Form by May 5.

SCHOLARSHIP PERSON. We recommend each chapter appoint a person (or a few people) to lead its scholarship efforts. This person should build and maintain relationships with educators at local universities with therapy programs. They should screen student applications and make recommendations to the board for chapter sponsorship. We recommend you request or require volunteer hours with your chapter in order for a student to gain sponsorship. (see [Key Roles](#).)

TIMETABLE:

- **January** – Begin screening possible student applicants.
- **Late-February until May 5** - National AMBUCS accepts online applications for its

scholarship program. All supporting documents also due by May 5 for all applicants. Students are instructed to give sponsoring chapter a copy. All chapter sponsorship forms are due May 5.

- **Mid-July** – The Scholarship Committee will meet at the Resource Center to make award selections.
- **Late-July** - Final scholarship winners will be announced. Award notices will be emailed to chapters. Certificates available upon request.

Want to sponsor a student but didn't screen anyone? No problem. Email scholars@ambucs.org and ask for student leads. We can send you leads from a certain state or school or program.

▶ OTHER COMMUNITY SERVICE

AMBUCS chapters are empowered to choose their own form of community service benefiting people with disabilities. This can take on an infinite variety of forms. There are two wonderful projects that, while not offered across the nation or supported directly by the ARC, are still frequently chosen by chapters.

RAMP BUILDING. Making homes accessible by building ramps has been a popular activity among chapters. A complete [ramp building guide](#) is available.

ADAPTIVE PLAYGROUNDS. Building and refurbishing playgrounds that can be used by children regardless of ability.

PROGRAM GIVING

Your chapter or members of your chapter can choose to support any or all of the three nationwide giving programs – Amtryke, Scholarships for Therapists, Cornerstone. The need is great in every community across the nation, we know, but supporting the programs on a national level ensures they continue to grow and impact new communities.

You can give to any of the programs through a [Memorial/Honor gift](#), by [donating a vehicle](#) or through a [planned gift](#). All three programs have honor societies for major donors and yearly recognition in the AMBUCS Magazine and at National Conference.

▶ AMTRYKE GIVING

If you give to the [Amtryke Program](#) on the AMBUCS website or by becoming a [Wish List Club](#) member, the entire gift goes directly to **Every Kid Needs a Bike** to fund Amtrykes for children waiting on the National Wish List.

AMTRYKE GIVING SOCIETY

If you designate your gift for the **Amtryke Big Heart Fund**, as an Amtryke Ambassador, only a small percentage of the whole fund is spent each year - ensuring an ongoing program. The Amtryke Big Heart Fund brings the good your chapter does locally to a national level and also helps grassroots efforts take the next step. Specifically, giving to the Amtryke Big Heart Fund supports these efforts:

Amtryke Therapeutic Tricycle Program and **Amtryke Veterans Initiative**. Both are supported in part by this Fund, mostly with research and product development.

National Amtryke Wish List. The wish list makes the Amtryke Program truly nationwide by providing charitable interventions to fund Amtrykes for those who do not live close to a chapter. Generally, around 600 Amtrykes each year.

Chapter Evaluation Sites and **Chapter Trailer Operations**. When chapters are ready to take the next step and broaden their reach into the community, the Amtryke Big Heart Fund makes up the difference to make the deep pricing discounts possible.

Those who give \$1,000 become **Amtryke Ambassadors**. Those who give \$10,000 (usually with ten gifts of \$1,000 over time) can found their own **Named Amtryke Endowment** – *Congratulations, your Amtryke was funded through the Fred Sammons Amtryke Endowment*. Each year a recipient on the National Wish List will receive an Amtryke in your name, or the name of a person you would like to honor, ensuring an ongoing legacy. You can choose, when setting up your Amtryke Endowment, to set criteria for which recipients you'd like to fund, say, from a certain state, with a certain diagnosis or who have waited the longest.

▶ SCHOLARSHIPS FOR THERAPISTS GIVING

If you give to the [Scholarships for Therapists Program](#) on the AMBUCS website or as a chapter to reach your 100% Program Giving Goal (see page 11), the entire gift goes directly to fund scholarships in the next school year.

SCHOLARSHIPS FOR THERAPISTS GIVING SOCIETY

If you designate your gift for the **Scholarships for Therapists Permanent Fund**, as a William L. White member, only a small percentage is spent each year - preserving the principle and ensuring an ongoing program.

Those who give \$1,000 become **William L. White Members**. Those who give \$10,000 (usually with ten gifts of \$1,000 over time) can found their own **Named Scholarship** – *Congratulations, you have been awarded the Fred Sammons Scholarship*. Each year a student receives a scholarship

in your name, or the name of a person you would like to honor, ensuring an ongoing legacy. You can choose, when setting up your Named Scholarship, to set criteria for the students you'd like to give a scholarship to, say, from (or studying in) a certain state, school, or those studying in a particular therapy field.

▶ CORNERSTONE GIVING

The **Cornerstone Fund** provides for the growth and development of the AMBUCS organization. Unlike the other two, it is not also the name of a community service program. Giving to Cornerstone, by any method, funds two main AMBUCS-building efforts:

AMTRYKE ROAD SHOW. An AMBUCS representative takes a trailer full of Amtrykes and adaptations to people or organizations who have expressed interest in providing Amtrykes to people with disabilities. We generally offer an In-Service Training (about the efficacy of the Amtryke and how to fit people to the best riding solution for them) and a 'Bike Day' where people with disabilities are invited to come in and be fitted. Road Show visits are often, but not always, hosted by physical or occupational therapy clinics. The end goal is to get people excited enough about the Amtryke Program that they become an AMBUCS chapter. It often takes several visits before people are willing to take that leap but the Road Show has proven itself the best way to found new viable mission-focused chapters.

NEW CHAPTER INCENTIVES. New AMBUCS chapters receive several incentives funded by Cornerstone. National dues are waived for the first two quarters. The founding chapter President and the member (of a different chapter) who was the key mentor for the new chapter, we call them a 'sparkplug,' get free National Conference registration and one night's lodging. The new chapter identifies their sparkplug as the one person who went out of their way to answer questions and give advice. Not every new chapter will have one. The **10-for-10 Promotion** discussed above is also funded by Cornerstone.

CORNERSTONE GIVING SOCIETY

Those who give \$1,000 become **Chapter Advocates**. Those who give \$10,000 (usually with ten gifts of \$1,000 over time) can make a one-time **Named Chapter Founding Gift – Congratulations, your new chapter is being supported by the Fred Sammons Founding Gift**. A new AMBUCS chapter will receive all they need to make them strong and growing—all in your name, or the name of a person you would like to honor. It will fund a Road Show visit that inspires and trains prospective members, the 10-for-10 promotion that teaches chapters to fundraise, waived dues for the first two quarters as well as free conference registration and one free night's lodging for the chartering chapter President. You can choose, when setting up your Named Chapter Founding Gift, to set criteria for the chapter you'd prefer to help found... say, in a certain state or region of the country or with a particular mission focus.

100% PROGRAM GIVING

Annually, on or about March 15, your chapter Treasurer will receive a 100% Giving Letter where you will be advised of your Program Giving Goal. The goal is chapter membership as of the February 28 Blue Chip Report times \$40 per member. For example: If your chapter's February 28 membership is ten members; ten members times \$40 equals a \$400 Program Giving Goal for your chapter.

Your chapter's total Program Giving to each National Program is reported and calculated from both member gifts and chapter gifts to the individual National Programs: Scholars, Cornerstone and Amtryke. After receiving your letter and prior to the end of the AMBUCS year (May 31), additional contributions can be designated to support any or all three Nationwide Programs in order for your chapter to reach its goal.

For each of the three programs for which the chapter reaches its 100% Program Giving Goal, it receives a 100% Program Giving banner patch and corresponding points on the 4th Quarter Scorecard. When your total contributions reach an average of \$40 per member for a program, you will receive 40 scorecard points. If the average exceeds \$40 per member in a program, you will receive one bonus point for each average whole dollar over \$40. If a chapter reaches the 100% Program Giving Goal for each of the three programs, there is a 100-point bonus on the Scorecard. Like the Scorecard and the Awards Program, participation is entirely voluntary.

Please Note: No portion of any donation to National AMBUCS (even a general donation) or to its programs goes to operations or administration unless specifically designated for that use by its donor.

100% PROGRAM GIVING HISTORY. In 1955 the membership pledged to fund a Living Endowment with small gifts from each member. The idea was that while we did not have a large pot of money with which to begin a true endowment, members were willing to work *Shoulders Together* to give the Scholarships for Therapists Program the same amount of money it would have earned in interest. And our generous members have honored their pledge for over six decades. We no longer refer to it as the Living Endowment (instead it's the Scholarships for Therapists Permanent Fund) but the legacy of visionary leaders and the members' gifts over time is more than \$8.9 million dollars of educational scholarships granted to more than 15,500 therapy students.

BRANDING

It may seem silly, but branding is serious business. Companies spend big dollars on building a brand and then maintaining it. When we say *Brand* we're generally talking about the logo, official colors, fonts, tone and language.

Think of McDonald's: their brand hasn't changed appreciably in decades. You don't see a different logo on each McDonald's as you ride through town. They're all the same. Why? So the restaurant is instantly recognizable and to convey a continuity of experience.

It's the same with us. All chapters should have a very similar look and feel and be using similar language. That way a person from Enid, OK will instantly recognize the AMBUCS name in Danville, IL and have a general idea of who they are and what they stand for. We are all different, but we have a continuity of purpose - inspiring mobility & independence.

NATIONAL AMBUCS LOGO. Yeah, we're a little crazy about it and how it's used. It is important that nothing you produce appears to be coming from the national organization. If you are creating it (trailer, t-shirt, brochure, sign), always use your chapter logo. However, if you need them, you will find AMBUCS and Amtryke logos with or without taglines on [flickr](#). If you need a different format or size, [contact](#) ARC. Please use with caution.

CHAPTER LOGO. If you don't have a chapter logo, contact ARC for a basic one or reach out to a local designer and have one made for you. Check out [fiverr.com](#) if you don't already know of a resource.

TIP: When you resize a logo on the page, hold down the shift key so it maintains its aspect ratio (doesn't get too skinny and tall or wide and squished). This works for any kind of image.

COLORS. Both AMBUCS and Amtryke use the colors of the American Flag.

RED

PMS 193C
R:187, G:19, B:62
C:19, M:100, Y:73, K:8
Hex: BB133E

BLUE

PMS 282 C
R:0, G:33, B:71
C:100, M:87, Y:37, K:51
Hex: 002147

We are using a few accent colors (non-official colors):

Light Blue

PMS 656 C
R:217, G:226, B:234
C:8, M:0, Y:0, K:6
Hex: D9E2EA

Aqua

PMS 554 C
R:183, G:209, B: 227
C:27, M:9, Y:5, K:0
Hex: B7D1E3

Teal (website accent color)

PMS 631 C
R:0, G:165, B: 185
C:77, M:14, Y:25, K:0
Hex: 00A5b9

FONT. Our logo is Arial Black so we used Arial frequently. Do feel free to use whichever font you like as long as it's easy to read.

TONE and LANGUAGE. Always strive to be upbeat, empowering and inclusive with your tone and language.

Please be respectful when speaking of and to people we serve. Address the person you are helping. Don't assume that the person is not of sound mind. Always put the person first and the diagnosis or disability second, even when the sentence structure gets a bit awkward. Never *a downs child* or *a disabled person*. Always *a child with down syndrome* or *a person with disabilities*. Say *diagnosis* not *disease*. Consider not mentioning the diagnosis when not relevant or just once rather than repeatedly. You may want to talk about challenges (muscle weakness, trouble gripping) rather than stating the diagnosis. When in doubt ask the child, parent or adult recipient what they'd prefer. It is true that the standard for what is and is not acceptable changes over time and people have differing opinions. It is worth the effort to stay current.

When speaking of AMBUCS, here are the most common mistakes. See the full [Nomenclature](#) document for more.

AMBUCS is always uppercase when talking about the organization or your chapter. Don't leave off the S. Possessive is AMBUCS'.

Use **Ambuc** or **Ambucs** when you are talking about a member or a several members.

Chapter. Never club. See why in the [Governance](#) section.

We are a **nonprofit charitable organization**, not a civic service organization. You are a chapter of a nonprofit charitable organization.

Amtryke. Please drop the uppercase T.

You can just use the TM symbol after the first mention of AMBUCS and the ® symbol after the first mention of Amtryke. No need to use them in every mention.

MEMBERSHIP DEVELOPMENT

Every member deserves the chance to learn, grow and take on new roles. Following are a few of the methods we recommend for developing your members and, thus, your chapter's full potential.

▶ GIVE EVERYONE A JOB

Really, everyone. Having a role in the success of the chapter makes members more invested.

Don't let the roles stagnate. Change it up. Maybe not every year but at least every five. Don't let someone become overburdened or burnt out. In addition to the elected officers (see [Officer Guidelines](#)), fill Key Roles and trainees for filling each Key Role next. Beyond that, what about official greeter, the person that visits people in the hospital or sets up the meeting room?

KEY ROLES

Recruiting members with appropriate skills to fill key roles is vital to your chapter's long-term success. Following are some suggestions that other chapters have found useful. Feel free to combine, exclude and change these as fits your chapter. Once you fill the roles useful for your chapter, give them someone to train to replace them.

AMTRYKE TEAM. The Amtryke Team is often made up of several knowledgeable individuals. Sometimes one person wears several hats.

1. **Orderer.** Places Amtryke orders with the ARC online or via phone or email. They act as the expert on Amtryke products and are familiar with the Amtrykestore.org. Maintains request forms, liability and photo waiver document sets. Keeps the Treasurer informed of orders.
2. **Mechanic.** Takes the lead in building and maintaining Amtrykes. Training for those interested in becoming or fine tuning their skills as an Amtryke Mechanic is available through AMBUCS University: Mechanics training at National Conference in the fall.
3. **Member Evaluating Therapist(s).** Assess the capabilities of applicants and fit kids and Veterans to trykes - especially at events when their own therapist cannot be there. Those interested can attend an [Amtryke Evaluation & Fitting Training](#) (AEFT) for Therapists near them.
4. **Liaison with therapy/health professionals.** Keeps your chapter's relationship with your non-member referring therapists strong by keeping the lines of communication open. Need help training your chapter's evaluating therapists? Schedule a [Road Show](#) visit or AEFT.

SCHOLARS. The Scholars person builds and maintains your chapter's relationship with allied health educators at local universities. They make the educators and their students aware of our Scholarship program as well as screen student applications and make recommendations for chapter sponsorship to the board. They will also help direct students to appropriate volunteer opportunities with the chapter.

PUBLIC RELATIONS. The Public Relations person publishes your chapter newsletter either (or both) electronically or via hard copy. They manage your chapter's social media and website presence. They reach out to the media when your chapter puts the AMBUCS mission into action and communicates about your chapter to funding sources and other chapter members. They also submit stories about your chapter's mission-based activities to the Marketing Director at the ARC for possible inclusion in the AMBUCS Magazine or facebook.

FUNDRAISING TEAM. The fundraising team works together to raise the funds needed to carry out your chapter's work in the community. These are the two key skill sets you'll want to recruit:

1. **Grant Writer.** Researches local corporate and foundation grant opportunities and then writes and submits them. Keep in mind that the Amtryke Grants Coordinator is available to help identify opportunities and fine tune your efforts. Please see the [Fundraising](#) section.
2. **Community Liaison.** Reaches out to community leaders and local businesses to invite them to become a part of our mission via financial or other types of support (such as funding a tryke, building it and hosting the giveaway). You may want to ask leaders with strategic skills to serve on your board.

EVENT PLANNER. The event planner works on the nuts-and-bolts level to plan events, pulling together and delegating responsibilities to members. They should work closely with the fundraising team to put on great fundraising events and also plan some fun chapter events or "socials." Whether it's a formal affair or a potluck, spending fun time together socially will build stronger bonds.

▶ **BIG HAT CLUB (BHC)**

The Big Hat Club is an elite club within the organization and also within participating chapters.

In order to qualify, a member must recruit three new members in a 12-month period. If you accept the honor of membership, you will agree to pay \$10 in annual BHC dues. You will receive a distinctive western style hat and be invited to exclusive events at Regional Training Conference and National Conference.

The club exists to take membership recruitment, fundraising and fun to a whole new level. Visit the website to learn more about [BHC history, mission and bylaws](#).

▶ **REGIONAL TRAINING CONFERENCE**

Encourage your members, especially officers and those filling the [Key Roles](#) for your chapter, to attend your Regional Training Conference in the spring. Where possible, think about financially helping those who want to go. Educating your most engaged members greatly benefits your chapter.

Each Regional Training Conference includes chapter officer training and many chances to share great ideas with other successful chapters in your part of the country.

▶ **AMBUCS NATIONAL CONFERENCE**

National Conference is Regional Training Conference writ large. It offers more of everything, all in four days in the fall (September or October). Again, please encourage your officers and [Key Roles](#)

people to attend. Support them financially, if you can and if it means the difference between an on-fire member getting to attend or not. Attendees will return to the chapter invigorated, inspired and equipped.

Each National Conference includes in-depth training in successfully running a chapter and Amtryke program as well as many chances to share great ideas with other successful chapters in your part of the country. There are also two wonderful mission-based events: The Great Amtryke Giveaway (where local children and Veterans receive Amtrykes) and Trek 4 Trykes a walk-a-thon to fund trykes for kids waiting on the National Wish List. And much more, of course.

▶ CHAPTER REVITALIZATION CASE STUDY

OLD CLUB, NEW VITALITY

- by Kevin Sheehan, Savannah Chapter President

Vitality - The Power or Ability of Something to Continue to Live, Be Successful, etc.

The Savannah, GA chapter was founded in 1941. After seven decades it was just plodding along. Membership was dwindling and its community impact had stagnated. In just a few short years, however, the chapter turned around and became strong, vital and growing. It more than tripled membership, fundraising and giving.

MAJOR CHANGES

1. Went from four chapter meetings month to two meetings a month and to shorter meetings with more substance.
2. All members encouraged to express ideas and given a stake in the chapter's success.
3. Involved long-standing members in important but often overlooked ways like greeting people, making everyone feel welcome, serving food, etc. Everyone wants to feel useful. We simply asked them what they wanted to do.
4. Appointed member of local media to our Board of Directors. He helps with press releases and media exposure. He tells the story in the way the media is looking for. After you have given away a few bikes, the bike is no longer the story. The media wants something to bite on. i.e. "Real Winner at Football Game is Boy from Darien with CP" or "Vision Problem won't keep this girl from riding a bike."
5. Chapter created new events like Le Tour De AMTRYKE where riders ride bikes, get tune ups, and have fun. And added BOWLAPALOOZA (celebrity bowling championship) as a very successful fundraiser to their 50-year-old bowling league for people with disabilities.
6. We ramped up our participation in the Amtryke Program.

TIPS FOR CHANGING GRACEFULLY

COMMUNICATION. Often we get frustrated and want to force our opinions on others because we think they are in the best interest of the group. People want to be respected and heard. Remember as kids the more we were TOLD what to do or not to do the harder we fought to do the opposite.

Talking with people (as opposed to *talking at*) allows open dialogue and exchange of ideas. It allows long-serving members to know they are valued not being tossed aside.

DON'T DEMAND, GIVE REASONS FOR CHANGE. Similarly, when suggesting ideas don't demand change, show how it benefits the chapter and everyone in it. When you give members valid reasons to change, they will usually go with it. Sometimes reluctantly, but they will go.

INTERTWINE HISTORY WITH MOVING AHEAD. No group is where it is without a past. Appreciate the past. Ask long-serving members to share stories and record them. Ask them to take you to a place where the chapter made a difference. Treasure history! It is why your chapter is where it is today.

BE WILLING TO DO WHAT YOU'RE ASKING. If I am asking for change, am I willing to be part of it? I have to be willing to do my part. I can't just ask for others to change. Am I *doing* or just asking?

WHERE IS THE PASSION? We were passionate when we joined AMBUCS. Where is the passion now? How do we reignite it? Look for ways you can make a difference. That's what kindles the passion – making a difference. Sit with a new member. Put together a storybook of your chapter. Ask members old and new to give you an AMBUCS story. Ask a long-serving member to tell a story and see their eyes light up and value to group increases! We **MUST** bring passion to expect passion from others.

FIND A JOB FOR EVERY MEMBER. When each member has a job, it is self-evident to everyone why they have value. It also cements the member to the chapter when they feel needed and vital. See the section on [Key Roles](#). Fill all those up and create more. Don't neglect the older members. Have someone be greeter for the event, meeting and even at each table. When doing a fundraiser ask long-serving members what connections they have. They might not have energy they had, but they are still a precious resource. If you don't use it, you lose it!

REFOCUS THE GROUP. We get caught in a rut of “this worked for years.” Just because it worked before doesn’t mean it is working now. Younger people are busier and have less time. Do you need four meetings? Maybe not. Use time wisely! People want to **do** things not just talk about it! What is our value to community? Focus on bringing that value to the community and members will come and stay.

NEW IDEAS, OLD INPUT. An example... Savannah AMBUCS sponsored a weekly bowling league for 50 years, in order to continue we needed to offset costs (\$15,000 / year). We came up with a new fundraiser called BOWLAPALOOZA. We decided to use the bowling alley like a golf course. Solicit sponsors. Our older members felt it was imperative we keep our bowlers involved. By listening and involving our bowlers, our members felt appreciated and bowlers and sponsors love it! Our bowlers bowl on sponsored teams.

Last year we raised over \$85,000! Most of the chapter volunteers on the day of the event. The new event is successful not just in fundraising but also in honoring history and all members.

It is important to ask members for input. Don’t ignore....ENCOURAGE!

WORK WITH CIVIC GROUPS. Remember our roots. We were a civic group once and we still have a lot in common. Offer the other groups the opportunity to be a short-term part of your on-going mission-based project. They could choose a kid, fundraise for the tryke, build it and then host the giveaway – maybe once a year or even as their one project for a single full year. Be sure the group is there for the end result, whether it’s a tryke giveaway or a new home access ramp. There are very few opportunities for a donor to see the final results of their gift and to know that 100% of it went to make it happen. Try the Jaycees (hey, when they age out maybe they’ll join your chapter) and the Rotary, etc. Really, any group could take on the project, from corporate team building to girl scouts.

2015 National Conference ***Old Chapter, New Vitality*** Educational Session Comments:

“Several new good ideas; wish we’d had more time; good discussions.”

“It was very educational being a new member.”

AMBUCS UNIVERSITY

AMBUCS University is an initiative to standardize and improve education for members who are (or would like to become) Mechanics, Evaluating Therapists or Road Show Captains.

MECHANICS are our chapter's Amtryke building and maintenance experts. At National Conference the main opportunity to learn will be at the Bike Build. Occasionally there will be additional time set aside for advanced topics. Every chapter will want to have a representative on hand to participated in the hands-on Bike Build training.

Evaluating Therapists are our chapter's experts at fitting people to the perfect Amtryke and adaptations for them. The hands-on [Amtryke Evaluation and Fitting Training](#) (AEFT) for Therapists runs 7.5 hours. A shorter 4 hour version without hands-on evaluation can also be offered. Open to member therapists as well as any other interested therapist. CCUs are sometimes available. We have received certification via [ProCert](#) for FIVE CCU (for the 7.5 hour version) for Physical Therapists in 34 states. We plan to offer AEFT in each region at least once every other year.

ROAD SHOW CAPTAINS take a trailer full of trykes on the road and form new chapters focused on the Amtryke program. Please contact the ARC if you are interested in learning more.

MARKETING YOUR CHAPTER

-staff contact, [Angela Labrecque](#), Marketing Director

One of the most common frustrations our chapters face is getting the word out to their community about who they are and what they do. While it certainly is a challenge, making sure your chapter has the following tools in place will take you a long way towards your marketing goals. Pair that with mission-based activities that change lives in the community and soon you may find your chapter has become a household name.

► WEBSITE

Having an online presence is absolutely vital but having a website is not. I would recommend new chapters start out with a facebook page (more about that below).

Many chapters feel purchasing and maintaining a website is worth the funds and time. You may have a savvy member or a friend of the chapter willing to build a website for you for free or at a low cost. Or you may choose to hire a web design company or local freelancer.

Regardless of who builds it, be very sure your chapter owns the rights to the website and can

access the back end freely without the help of the builder. Even if you never intend to make changes yourself, you still need to know how to access it so if something unexpected happens you can pass maintenance of the site on to someone else.

You may want to research a free website building tool like Wix.com or Wordpress. I do recommend, if you can, paying the fee to get a custom url that does not include the name of the builder in it. For instance: www.ambucschaptername.org rather than www.ambucschapter.wix.com/ambucschapter

You can choose to take **online donations** several ways. You could use [PayPal](#) on your website or a crowdfunding tool (see [Crowdfunding](#)) or another proprietary third party processor (there are lots of them out there). Please research carefully.

► SOCIAL MEDIA

IN A WORD: YES! Choose one or two platforms and commit to posting regularly. Ideally, at least once a week but certainly at least once a month. This would be a fabulous job to give to an excited and engaged younger member.

FACEBOOK TIPS:

- Never (or very rarely) post without a picture or video.
- Post at least once every other week but rarely more than once a day.
- You can set your facebook page to automatically feed to twitter.
- If you are just setting up a page, use a generic chapter email address like ambucschapter@gmail.com and be sure the passwords are available to all leadership so there's no lost pages if your social media person moves away. You can set up multiple admins if you want several people to post to the page. Be sure to pass on any chapter rules for conduct or content before giving out the login info. This is a great role for a younger member.
- Here is the help center: <https://www.facebook.com/help/> Specifically, here's the section on Pages (as opposed to a personal profile): <https://www.facebook.com/help/127563087384058/>

Want to drill down further into Social Media? Here's a [Social Media PowerPoint](#).

► MEDIA RELATIONS

Getting media coverage can boost chapter membership and donations. It's not the silver bullet though. Public reaction is generally very short lived but can be strong while it lasts.

TIPS:

- Read the paper and watch the news. See who tends to cover human interest stories and

focus your efforts on that specific reporter. Does anyone in your chapter have a connection to that person? If so, use it!

- Be very choosy in what you submit for coverage. Make sure it is timely (very new or not yet happened) and the impact on the community is clear. Include the warm fuzzies! If you can't think of how your story impacts the community, don't share it.
- Spaming them with stuff they'd never print will just annoy them. If they don't choose to cover several stories, ask them for submission pointers. If nothing else, it will open a conversation.
- Submit press releases as Word documents not as pdfs. This seems counter-intuitive but the Word doc makes the process easier on them and that makes them more likely to choose your story.
- Be clear about what you hope they'll do for you. Are you hoping they'll show up at an event or simply run a version of a story that you've already written? Whatever it is, say it specifically. Be respectful. There are a hundred other people clamoring for their attention...all convinced that their story is the best and most important.
- Understand that they have time, space and formatting restrictions. They will not run your story as you wrote it or show everything they filmed. They can't.
- If you are submitting a story, include high resolution images. Submit images that focus on the person benefiting or that puts the event in context of the larger community. Submit 1- 5, not 300.
- If it's an ongoing event that they've covered before, be sure to emphasize what's new and the impact on the community.
- If the media attends your event be very gracious but not oily or desperate. Again, media coverage is great but not the end-all.
- Consider involving media people in your chapter. Maybe ask someone to serve on your board?

▶ PRINT MATERIALS

FREE MARKETING DOWNLOADS. Don't miss this whole page of great free tools that will make your chapter look sharp and clearly communicate your mission - [Marketing Downloads](#) under Members on the website. You will find logos, images and videos as well as customizable flyers, letterhead, press release, business cards and vinyl chapter banner. Please see the [Branding](#) section above for official colors, logos, terms, etc.

GET THE WORD OUT TO OTHER CHAPTERS. Share your good ideas and successful ventures. We print a quarterly magazine, *AMBUCS Magazine*, chronicling the great work of our chapters and exciting things coming up. Don't ever see your chapter in the Magazine? That's probably because we've never heard from you! Please send in stories and images of the ways you're putting the mission into action in your community. All members automatically receive a copy. Once you make it into the magazine, buy some extra copies and take it with you when you

request funds and explain your mission. Shared stories could be shared on facebook or the [blog](#), instead.

AMTRYKE CATALOGUE. Make sure a copy gets in the hands of your evaluating therapists and anyone that fits or displays trykes regularly. We print an Amtryke Catalogue (roughly) annually. You will find the most recent [Amtryke Catalogue](#) here. We'd be happy to send you a copy (or copies) for .50¢ each plus the cost of postage.

BROCHURES. We print and sell a General AMBUCS Brochure, a Veterans Initiative Brochure, Friends Brochure and Wish List Club Brochure. They are available for .15¢ or \$15 for a pack of 100 in the [AMBUCS Store](#). We do have customizable versions of the brochures. They are in InDesign and would need to be professionally printed and cut.

BANNERS. Need to make your marketing mobile? We can print custom vinyl banners for you. Stands are also available. We have banners advertising AMBUCS, Amtryke, Scholars or Ramp Building. You can add your chapter name and/or website to the AMBUCS banner.

CHAPTER LOGO. Need a simple chapter logo? We can make one up for you. See Logos section above in [Branding](#).

FUNDRAISING

-staff contact, [Jessica Wall](#), Amtryke Wish List and Grants Coordinator

Once the ARC has secured your chapter Employer Identification Number (EIN), you're ready to start fundraising for your organization. Not only do you need it to open your bank account, but many donors will only give to your chapter when you are officially recognized as a nonprofit by the IRS through the AMBUCS Group Tax Exemption.

▶ TYPES OF DONORS

There are many different sources to consider when obtaining donations. What works for one may not work for all. There are variables that might influence your chapter's approach to fundraising (i.e., your geographical presence or the size of your chapter).

YOUR MEMBERSHIP. People within your chapter might be willing to make tax-deductible donations to your organization. They've already demonstrated they believe in the AMBUCS mission. It's possible someone will want to financially invest, too.

Your chapter is responsible for paying quarterly membership dues to National AMBUCS. In the same pattern, some service organizations charge membership dues within their chapter. It provides a source of revenue that can be used to cover overhead cost and/or to fund the mission.

INDIVIDUALS. Even if your membership isn't willing to donate, maybe they have friends who will. Ask your members to consider any of their acquaintances who might turn into potential donors. Do they know someone who works for a charity or someone who owns a business? Do they belong to any other service organizations, or do they know someone who serves on the city council? If you have a member who is well-connected within the community, consider making this individual your head fundraiser.

Your chapter should consider whether or not you will encourage families to participate in the fundraising process. Who better to give to the child's tryke than people who know and love him or her? Setting up a crowdfunding account is a wonderful way to provide an online platform to your interested parents. (See [Crowdfunding](#).)

SPECIAL EVENTS. The good old-fashioned pancake supper has been a tried and true source of donations. Keep in mind that your chapter will be on the hook to cover the expenses of your event so you should strive to make sure your overhead is manageable. See **Corporations** to learn more about event sponsorship; this will also help cover any event expenses.

That being said, the local fundraising event has always been a great way to get funds flowing when your chapter is just starting out. It's also a wonderful way to garner media attention and to introduce your chapter to people in the community.

At the Resource Center, we provide support if you want to host a [Trek 4 Trykes](#) walk-a-thon event. Angela Labrecque, marketing director, can help set you up with an online registration platform, signage and t-shirts.

We recommend you fill out a [Proof of Insurance Request Form](#) for each event (even if it is not a new one) just to ensure the event's activities are covered.

If you decide to coordinate a fundraising event, don't miss an opportunity to share how your spectators can continue to support your chapter—either through membership, volunteerism or by giving future donations.

CORPORATIONS. Area businesses can be a hard donor to capture. Many of them are drawn to incentives—is there a way that you can publicize the business name on your chapter's website, facebook page or event signage? Corporations are drawn to event sponsorship because there's potential their business name will be up in lights in front of the many people who attend your event.

One popular corporate gift is Wal-Mart's Community Grant. Connect with your local Wal-Mart manager. The manager will instruct you to fill out the application online. Once you've done that, contact the manager to say you've submitted the request. <http://giving.walmart.com/apply-for-grants/local-giving>

Note: You'll want to start soliciting to businesses early. Some of them create budgets at the beginning of their fiscal year; if your chapter isn't in the budget, you'll have to wait.

Many chapters have had success asking corporations to fund several Amtrykes, built them and then host the giveaway. From the corporation's point of view, the project is a great team building exercise and can garner great media attention for them (and you).

Matching Gifts. Ask your members and donors if their employers do matching gifts. If so, this could easily double each dollar given.

OTHER CHARITIES OR SERVICE ORGANIZATIONS. AMBUCS (formerly known as American Business Clubs) grew from its service club roots, and along the way, we added the 501c3 charitable status to our nonprofit resume. The 501c3 status makes it easier to fundraise from foundations and corporations.

Service clubs are national organizations with a network of clubs. These clubs volunteer and fundraise to support charitable initiatives in their communities. Ever hear of the Lion's Club, Kiwanis, Rotary? These are service clubs, and these local community servants might be interested in supporting the good works of your chapter.

Some will write checks and others will be interested in being more involved. Much like the corporations discussed above, they may very well be interested in funding several Amtrykes, building them and then hosting the giveaway. Again this could garner great media attention for both organizations. It's also a great way to get a group of people bit by the bug and coming back every year for more Amtryke smiles.

Now, other charities are a little more difficult to convince. They are taxed with trying to fundraise for their own mission. You might find that you have like-minded charities in your community, though, who wouldn't mind partnering to support the need. On the National level, we have had support from the Ronald McDonald House Charities as well as Variety the Children's Charity. See if they have a tent (chapter) in your area: <http://usvariety.org/>.

FOUNDATIONS. The art of searching for and writing grants is detailed in the [Grant Writing Manual](#). You may also look at this [Grant Writing overview](#).

One of the biggest complaints we hear from new chapters is that foundations often request their financials, a budget, the number of people they've assisted, etc.—all of the things that come from time and experience. Quite frankly, new chapters should wait for those grant opportunities until you have a resume...a record of good work.

In the interim, investigate smaller-scale grants or maybe even charitable trusts. Sometimes these don't require quite as much proof. When going after large grants, the grantor is going to make sure that your organization is financially responsible and that you have and will continue to provide impact.

▶ CROWDFUNDING

Crowdfunding: *A method of raising capital in small amounts from a large group of people using social media and the internet.*

Viral: *Any content or media that becomes widely shared through social networks and online.*

In this tech-savvy age, the immense power of peer-to-peer crowdfunding via social media has roared onto fundraising the scene.

Early Crowdfunding services like GoFundMe or Kickstarter were revolutionary because, for the first time, an average person had the ability to reach millions of potential donors with their 'ask.'

There's power in people. When it comes to the children on your chapter's wish list, for instance, no one cares more about each kid than their friends, family and community connections. Crowdfunding raises money from the people closest to the one benefiting— which makes the message more powerful.

It spreads online from one person who cares deeply, to their social connections, and outward in an ever-expanding ring. For instance, 6-year-old Deborah had been waiting on the Wish List for over a year. Her family created a Crowdrise account on a Friday afternoon and the cost of the bike was raised over the weekend!

I urge your chapter to consider creating a crowdfunding account. Not only does news travel fast via the Internet, it's become a comfortable tool for a lot of people. If you're not asking for money online in a way that people can respond to immediately, you are missing out!

Now let's talk turkey. There are about ten notable crowdfunding services that meet the needs of non-profits. Crowdrise and Razoo get my stamp of approval. Both offer a free account and will support multiple campaigns (say, one for Amanda's tryke, one for Jake's tryke and one to fund an Evaluation Site at the local children's hospital). Both platforms automatically send tax deductible receipts to your donors so you don't have to hassle. And both run on the lower end of associated costs.

Before you run away, let's not forget that sometimes you have to be willing to spend money in order to make money. These crowdfunding services offer an attractive, secure and easy-to-give platform for you and your donors, and they deserve to be compensated.

Here are [directions for setting up a Crowdrise page](#) for your chapter. Here are the directions we give to [parents for setting up a fundraiser for their child](#) (to sidestep HIPPA).

If you're itching to learn more, feel free to reach out to me, and I'll talk you through this crowdfunding business and share best practices to help make your new account a success!

▶ STEPS TO SUCCESS

FIX YOUR CHAPTER NAME ON GUIDESTAR. (<http://www.guidestar.org>) Guidestar is the largest source of information on nonprofit organizations. Many donors will look at how you measure up by taking a peek at your Guidestar profile. This information pulls directly from the IRS so, essentially, you as an AMBUCS chapter have a Guidestar profile whether you want one or not.

You should contact Guidestar to claim your charity. At this time, you can beef up or correct the information that is being shared about your chapter. **Hint:** The more information you fill in, the higher you rank on Guidestar. It's also important to claim your chapter on Guidestar because it is the source of information for many other platforms that service nonprofits. If you want it correct on your crowdfunding page, you need to make it right on Guidestar first.

The most important reason for claiming your Guidestar page is so that you can fix your chapter name. When we apply for your EIN number under the umbrella of our nonprofit status, we include your chapter name as the dba (doing business as). Because of that, the IRS makes your primary name "National AMBUCS." You don't want your supporters to call you by the wrong name or to think they have found the wrong organization.

First, you'll want to [open an account to claim your chapter](#). When searching for your chapter, search "National AMBUCS" and the city, state in which you are chartered. For example, when claiming the Piedmont Chapter, we had to enter "National AMBUCS High Point, NC." You'll need to verify by entering your EIN number.

After claiming your chapter, there might be a 1-2 day delay while Guidestar verifies your identity. At that time, you can select to edit your charity (including the name). Again, there might be a slight delay while they update your name, but Guidestar is usually pretty fast to react.

Once you've changed your name on Guidestar, you should be able to set up other accounts (like Crowdrise, PayPal, Amazon Smile, etc.) that recognize your chapter name by its actual name. If you jumped the gun too soon, you can send the provider a message requesting that they update your name. Many times, they'll make you prove it by submitting a link to your Guidestar account, which now should display your actual chapter name.

Develop a Donation Receipt Letter. When someone gives a tax-deductible gift to your chapter, they are entitled to a receipt that documents their gift. Here is a [donation receipt letter example](#) that you can easily customize for your chapter.

Note: If a family member contributes towards a person's tryke, they are not eligible for tax credit because of their relationship to the recipient. According to the IRS, it isn't a charitable act when you're helping one of your own family members. However, it is still good practice to acknowledge their contribution with a receipt. You may issue them the same letter you give to

other donors; we cover the bases with a note that says, "National AMBUCS, Inc. is a 501(c)3 charitable organization. Your gift is tax deductible to the full extent of the law. However, if you are related to the Amtryke recipient by blood or marriage, per current IRS regulations, your gift is not eligible for tax deduction."

Keep in Touch with Your Donors. Be sure to keep contact information for the people who have invested in your organization. It's possible they may give again if asked. Furthermore, many foundations will want some type of correspondence that lets them know how you spent their funding. Mark these deadlines on your calendar. Rest assured, if you don't, they'll remind you.

Develop Solicitation Materials. There are examples of a [grant](#) and [letter of intent](#). Feel free to use these materials but be sure to customize them to reflect your chapter. What your chapter has done and accomplished are important tidbits that illustrate how important you are to your community. Ask your chapter President or other officer for the data submitted to the Resource Center for your chapter's annual report and report of charitable giving. This will give you real, meaty data about how your chapter impacted the community.

Do Your Research. Start looking into who might be a potential donor. In the grant writing materials, you'll see that we promote <http://foundationcenter.org/find-funding/fdo-quick-start>. Once you've located the grantors in your area through Foundation Center, use Guidestar to obtain copies of their 990 tax records and history of the foundations' giving.

Also, take a look at other charities or local fundraisers within your community. See who is supporting them by checking out their websites and facebook pages. It's likely you will find corporations who are interested in sponsoring events or people who are interested in giving to causes similar to yours.

Be a Master Marketer. Marketing and Development go hand-in-hand. How you publicize your chapter will impact how a potential donor perceives your organization. Try to establish an online presence. Even if you don't have a website, create a crowdfunding page or facebook page. The staff at the AMBUCS Resource Center belong to the Piedmont Chapter; you can check out our Crowdrise page here: www.crowdrise.com/piedmontambucs. Many donors want to give with the ease of online; make it as easy for them as possible.

And don't miss an opportunity. When you have an event worth publicizing, like a giveaway, contact your local media. While there, be sure to take pictures, take pictures, take pictures...and then some video. You'll need these later when promoting your work in the community to potential donors.

There's plenty of great tips for better marketing your chapter in the [Marketing Your Chapter](#) section. Keep in mind, the better marketer you are, the better fundraiser you are.

GOVERNANCE

-staff contact, [Jessica Wall](#), Director of Development & Programs

Did you yawn when you read the word Governance? Well, stay tuned. There's lots of great information in this section.

▶ AMBUCS GROUP TAX EXEMPTION

In 1996 National AMBUCS changed from a 501c4, a civic service organization like Lions or Rotary, and became a 501c3, a nonprofit charitable organization like the American Red Cross. Some members have not fully understood the significance of this change.

501C3 TAX STATUS. Public charities enjoy unique tax status via the 501c3 designation. Most AMBUCS chapters qualify under the National AMBUCS 501c3 Group Tax Exemption - #8069.

A few chapters have their own 501c3 status and are not included in the group tax exemption. Chapter officers should be aware of their chapter tax status.

Member dues are tax deductible, but must not include meal expenses.

501C4 TAX STATUS. Civic service league/service club organizations do not enjoy the same benefits as public charities.

A few chapters opted not to be included in the conversion to public charity status in 1996. These remain a 501c4. They should not issue tax deductible receipts – or represent themselves as being a part of AMBUCS group tax exemption.

Dues and contributions to these entities are not tax deductible.

BECAUSE OF THIS CHANGE, please no longer use the words *civic* and *service* when describing your chapter and replace with *nonprofit charitable organization*. This change is also why we call a group of members a *chapter* rather than a *club* - to make it clear that we are legally no longer part of the service club movement but, instead, are now allowed to write grants, seek contributions, accept tax-deductible donations, etc.

▶ CHECK WITH IRS.GOV

You can check your official chapter status with the IRS on [IRS.gov](https://www.irs.gov) (Search EO Select Check). Scroll down and click on the blue "Exempt Organizations Select Check Tool" button. It will list

Limit search to organizations that (select only one):

- [Are eligible to receive tax-deductible charitable contributions](#) [Were automatically revoked](#) [Have filed Form 990-N \(e-Postcard\)](#)

three search criterion:

1. If you choose the first option, only National AMBUCS will appear. None of the chapters will show since they are under National AMBUCS' tax exemption umbrella. This is where the bona fide subsidiary memo comes into play. It proves that your chapter belongs under the umbrella. They call this a **Group** which they define as: "Generally a central organization holding a group exemption letter, whose subordinate units covered by the group exemption are also eligible to receive tax-deductible contributions, even though they are not separately listed."
2. If you choose the second option and search by EIN, chapters that have had their exempt status revoked will show - along with the date revoked.
3. If you choose the third option and search by EIN, chapters that filed the 990-N (e-Postcard) will show. Those that filled out the 990 or 990-EZ will not appear. If you fill out the 990-N you will find a complete list of every filing.

▶ PROVING YOUR TAX STATUS

You will probably be asked to prove your chapter's tax status when [opening a chapter bank account](#) and sometimes when seeking funding through grants, foundations, etc. Here are the documents they may ask for:

DETERMINATION LETTER. Chapters within AMBUCS Group Tax Exemption do not have their own determination letter from the IRS. They should use the [National AMBUCS tax determination letter](#) on the AMBUCS website.

BONA FIDE SUBSIDIARY MEMO. The ARC prepares a special memo for third parties that explains chapter tax status and the group tax exemption for donors. Chapters may request a copy of this memo from the ARC.

AFFILIATION AGREEMENT. Your chapter filled out and sent a copy to ARC as a part of the charter packet. If you no longer have the original, we can give you a copy.

ARTICLES OF INCORPORATION. ARC files with your state. Your state may have sent documents to you or to the ARC. If you don't have them, check with your state.

▶ SALES TAX EXEMPTIONS

Sales tax exemptions are issued individually by states. Chapters are not usually automatically exempt from sales tax. Chapters must research the law in their respective state to see if they qualify.

It may not be worth the bother, unless the chapter has considerable expenses that qualify as tax exempt.

HANDLING AMTRYKE TRANSACTIONS:

Most chapters are not charged sales tax for Amtryke purchases. However, for example, North Carolina chapters are not tax exempt.

If chapters have families who purchase Amtrykes, the transaction should be directed to Amtryke, LLC rather than through the chapter accounts. This avoids putting the chapter in a reseller position and the need to collect and pay sales tax on the activity.

▶ ANNUAL REPORTING

TO THE IRS THROUGH FORM 990 – TAX RETURN FOR NONPROFITS

Due four and a half months from the close of your fiscal year. Historically, the chapter fiscal year has been June 1 – May 31 but some chapters moved their fiscal year to the calendar year. Either is permissible. For chapters on a June 1 – May 31 year, the annual tax return is due on October 15. For those on the calendar year (January 1 – December 31), the annual tax return is due on May 15.

990-N E-POSTCARD RETURN. If your chapter's gross receipts are \$50,000 or less, your chapter can file with the e-postcard. [Directions on IRS.gov](#). The IRS has recently changed the url to file the e-Postcard. If you have issues logging in, try shutting your computer down and then only having the browser open. Here are some [troubleshooting tips](#) and a contact number.

990 OR 990-EZ. Chapters with greater financial activity (consistently over \$50,000 annually) must file either a Form 990 or 990-EZ.

Note: Some chapters with gross receipts under \$50,000 still choose to file a 990-EZ (rather than the e-Postcard) so they can perform an audit for fundraising purposes. Grants and foundations often require an audit.

TO NATIONAL AMBUCS THROUGH FORM 135/136

FORM 135/136. Online annual report and report of charitable giving – submitting this form is required annually by the AMBUCS Board of Directors. It is used to insure good chapter governance and for the annual Group Exemption Report the ARC files with the IRS. Below is an explanation of the elements the form asks about. **Due November 15.**

Corporate status. National AMBUCS files articles of incorporation papers for all new chapters. This is an important part of the chapter's risk management. It helps to insulate chapters and officers from personal liability. Chapters often must report or file annually to the Secretary of State to maintain their corporate status. What does your state require? Chapter officers should keep up-to-date with their state requirements to keep their status active.

Charitable giving. The 135/136 form collects data about the scope of chapter operations. This reflects financial data as well as estimates of member and volunteer hours and activity. Chapters can use this data for their own PR – for example, posting this activity to social media or when speaking to potential donors.

Basic financial reporting. ARC collects basic financial data from all chapters to measure the scope, impact and outcomes of the entire organization.

▶ CHARITABLE REGISTRATION IN STATES

Charitable registration allows chapters to fundraise in their state. National AMBUCS registers in every state we have chapters. Some states require an additional registration by individual chapters.

WHAT DOES YOUR STATE REQUIRE?

Some states have on-going fees or other requirements. Fees are sometimes nominal and sometimes based on annual budget.

If chapters use professional fundraisers (hired consultants or other 3rd party) they almost certainly are required to register in the state.

Check with the ARC if you are not sure what is required by your state.

▶ RISK MANAGEMENT

There are several layers to covering all potential liabilities and protecting chapters and members/volunteers.

INCORPORATION.

Chapters must keep their corporate status with their state as a nonprofit active and up-to- date.

VOLUNTEER PROTECTION ACTS.

These acts of Congress do provide some protection for chapters, members and volunteers.

AMBUCS LIABILITY INSURANCE.

Administered by National AMBUCS for the organization, chapters, members/volunteers. The national organization provides a blanket liability policy for all chapters and members for:

Program activities. These include community service projects, Amtryke giveaways, ramp building and many other community service activities.

Fundraisers. Many chapters hold special events as fundraisers. Often these events are covered,

but there are exclusions in the policy. We recommend you fill out a [Proof of Insurance Request](#) for each of your events (even if they are established) to ensure all activities are covered.

Liability insurance protects and defends chapters and members from liability for covered AMBUCS related activity. Generally, it protects AMBUCS chapters for accidents and injuries at chapter sanctioned events. (see the [policy explanation](#) at AMBUCS website and how to mitigate the chapter's risks).

Normal exclusions do apply and may require your chapter to purchase additional specific coverages. See AMBUCS website for a [list of exclusions](#).

National AMBUCS has an [Improper Sexual Conduct Policy](#). You will find some [Common Sense Measures](#) to protect yourself and your chapter from liability.

Chapter Cost - \$104 per chapter per year – billed quarterly at \$26 on the chapter's account.

AMTRYKE PROGRAM

- **Product liability.** Amtryke, LLC maintains a product liability insurance.
- **Therapists.** AMBUCS provides a professional liability coverage for volunteer evaluation of riders for Amtryke evaluations. Therapists also generally have their own liability policies.

Note: Because of this protection for Therapists who perform Amtryke evaluations and to limit your personal and chapter liability, always have a therapist perform every Amtryke evaluation. **If you are not a therapist or other health professional, do not perform an Amtryke evaluation/fitting.**

CHAPTER Level

- **Directors and Officers Liability.** Most chapters do not utilize this kind of coverage. Chapters with significant programs may seek to add this coverage, but it is rare in AMBUCS volunteer based chapters.
- **Treasurer Bonds.** Chapters may decide to provide bond for their Treasurers. This depends on the financial scope of chapters, and should accompany sound financial practices by the chapter.

▶ BIG HAT CLUB (BHC) STATUS

The Big Hat Club:

- It is not legally considered a separate entity – and is not recognized as a separate nonprofit.
- The BHC is considered part of the chapter and reports under the chapter EIN.
- The BHC activity is included as part of the chapter financial statement and annual tax return.

▶ GAMING LAWS

ARE YOU AFFECTED? Gaming includes such fundraising activities like raffles, bingo, monte carlos, etc.

State laws vary greatly about gaming laws. Chapters must research their own state's gaming laws to see if they comply.

▶ GOVERNANCE CONCLUSIONS

Use the AMBUCS officer's calendar to help you anticipate and comply with the various reporting and tax return deadlines through the year.

Reporting is important! It protects chapters and their officers and members.

RISKS? Chapters will lose their tax status after three years of non-reporting to the IRS. Chapters can also lose their AMBUCS chapter status for non-reporting and non-compliance.

AMBUCS chapter status is a valuable asset – be sure and protect it by diligent reporting and paying due diligence to governance issues.

AMBUCS OFFICER GUIDELINES

Welcome to Chapter Office! We are thrilled that you have taken this step. In the following pages you'll find a great deal of information about filling your new post and tips for success. We encourage you to take advantage of the training opportunities offered at Regional Training Conferences (spring) and National Conference (fall).

▶ EXECUTIVE BOARD

The Executive Board serves as the leadership team for the chapter. Laying the foundation for a great chapter year starts with the Executive Board. The Executive Board consists of the President, vice President, Secretary, and Treasurer. This team will become a closely knit group of friends planning and working for common goals.

The Executive Board collaborates to compile chapter goals for the coming year. Once your goals are decided, you are ready to define the chapter structure needed to accomplish the goals. Your chapter may need to add [key roles](#) or, if your chapter is very large, you may choose to use a committee system.

PRESIDENT. The President leads chapter meetings and chairs board meetings. The President also supports and follows up to ensure tasks are completed. The President should be familiar with the chapter's bylaws and optional policy guidelines.

VICE PRESIDENT. In many chapters, the Vice President is in training to be President the

following year. The Vice President should be familiar with the chapter's bylaws and optional policy guidelines.

SECRETARY. The Secretary is the administrative officer of the chapter. The Secretary keeps the chapter records up to date: bylaws, membership reporting activity, and corporate status of the chapter. The Secretary should be familiar with the chapter's bylaws and optional policy guidelines.

TREASURER. The Treasurer is the financial officer of the chapter. This can be another officer or be combined with the Secretary responsibilities. The Treasurer should be familiar with the chapter's bylaws and optional policy guidelines.

CHAPTER BOARD MEETINGS

- Board meetings are vital to the successful functioning of a chapter.
- It is the President's responsibility to see that a board meeting is called at least once a month and at the time stated in the chapter bylaws.
- The Board of Directors is presided over by the President of the chapter, or the Immediate Past President, as provided by your chapter's bylaws and policies.
- Your chapter's Board of Directors is made up of the elected officers, the Immediate Past President and the directors (as described in your Chapter's Bylaws). Whomever serves as chairperson of the board (you or the Immediate Past President) only votes in case of a tie.
- For all topics not covered here or in the bylaws, please refer to [Robert's Rules](#) for guidance.

Tip for streamlining your board meetings: "Two situations when adopting or accepting a report is never proper are in the case of a Nominations Committee report, which is always followed by nominations from the floor, and a Treasurer's report, which is always simply filed for audit." - Robert's Rules for Dummies, C. Alan Jennings, Wiley Publishing.

THE PRESIDING OFFICER'S RESPONSIBILITIES. It is the presiding officer's responsibility to conduct meetings in a business-like manner. The members of the board should approach the problems at hand with an inquiring, open mind, considering the good of the chapter as a whole.

CONFIDENTIAL DISCUSSIONS. At the beginning of the year remind members of the board that meetings are for a frank and open discussion of chapter problems. Personalities are to be left out of such discussions if at all possible. Sometimes this cannot be done; therefore, remind the board all such discussion is confidential and not to be discussed outside the room with other members.

VOTING. Remind the board that once a vote has been taken, this becomes the unanimous position of the board. A member whose position was defeated adopts the position of the majority. He or she does not have the privilege of saying, "I didn't vote for it (or abstained), I won't help."

TIMING. Sufficient time to review and vote upon committee proposals and to handle the business of the chapter must be allowed. A half hour board meeting preceding or following a regular chapter meeting will not get the job done. Follow a regular, prescribed meeting time as stated in your chapter’s bylaws.

DOCUMENTATION. Taking minutes at regular chapter meetings is not necessary. However, when you conduct official business meetings and board meetings you should take minutes and keep them in your chapter’s records. The ARC does not keep chapter minutes of any kind and there is no reason to submit them.

BOARD AUTHORITY AND LIMIT. The board runs the chapter, making the final decision on all matters except the four areas listed below (which can only be approved by a vote of the general membership at a business meeting).

1. Change of meeting time or place.
2. Change of dues structure.
3. Adoption of a chapter money raising project.
4. Adoption of a chapter community service project.

REQUIRED CHAPTER BUSINESS MEETINGS. The four areas listed above that limit board authority must be referred to the general membership for a decision. Notice should be published in the chapter newsletter in advance of date scheduled for discussion and vote. If spirited debate is expected, call for a closed meeting of the members with no guests present.

To gain chapter cooperation on decisions which the board believes is for the best welfare of the chapter it must sell its ideas—and get a majority vote. Members will be more inclined to work and contribute when included in the decision process in these four important areas.

REPORTING BOARD ACTIONS. Report the actions of the Board in the chapter newsletter and/or at subsequent chapter meetings.

ACCOUNTABILITY & TRANSPARENCY

Accountability. AMBUCS chapters are charitable organizations and must conduct operations in a businesslike manner. Officers and members have a fiduciary duty to act in the best interest of the organization. Trust but verify.

Transparency. Your chapter should have at least three officers. The Treasurer functions as the bookkeeper; primarily logging incoming and outgoing funds. The other two officers act as dual signatories for all checks. This provides the required checks and balances necessary for a transparent organization. In accounting terms, this is called “division of duties.” All officers are responsible for reporting accurate information to chapter membership and to the national office.

If your chapter already has checking account(s) established, please verify that the account(s) have dual signatories and at least two people authorized to view and access account records. If not, get it done! Banks may ask for your chapter minutes or a chapter resolution to make the change.

What can be done to improve accountability and transparency?

Chapter officers – you need to provide your membership with clear, timely and easy to read information, i.e.: financial statements, bank statements and records, minutes of meetings, contracts, etc.

Members – you should not hesitate to ask for this information. And ask for it regularly. We are all friends, but your chapter's operation is a business. You wouldn't allow your business to just operate without real oversight. It's not hard or unpleasant. It's necessary!

It is strongly recommended that monthly bank statement(s) be reviewed by a chapter member who has financial acumen. This person either approves the statement(s) or brings his or her concerns or findings to the chapter board. It's recommended that statement(s) and reports be kept for five years. Again, division of duties.

If your chapter is involved in fundraising that handles a lot cash and currency, it's prudent to always have two members count, record and document funds prior to depositing. This information is retained and then shared with the treasurer. Any discrepancies (bank deposit does not match accounting) should be addressed immediately. Chapters should consider obtaining a fidelity bond for the treasurer and any signers on accounts.

All of this might sound like we don't trust our valued Treasurers. But, really, all these steps serve to protect both them and your chapter from the suspicion of wrongdoing.

Tips for smaller chapters

Consider requiring dual signatories for checks, even if one of the signatories is the Treasurer.

If you don't conduct monthly chapter board meetings, find some way to get the bank statements in front of a chapter member who has adequate knowledge and expertise in this area. They could even be shared and approved digitally.

No matter what you do, please ensure that your chapter has some means of proving accountability and transparency.

AWARDS PROGRAM

CHAPTER SCORECARDS. This optional program honors the participating chapters who have had the most outstanding performance over the past year. Awards are given at each AMBUCS National Conference in the fall of every year. [Award Guidelines](#) are available on the website.

If your chapter would like to participate in the Awards Program, complete each quarter's [scorecard](#) at the last board meeting of the quarter. Fill out and submit your form on the website and print a copy for your governor and region director. See more in the Membership Forms section below.

Great strategy: Use the quarterly Chapter Scorecards as a check sheet for planning your year and noting chapter progress. Print all four scorecards and use them as a reminder as you make next year's plans with the Board.

Achievement Awards. This optional program recognizes individuals and chapters in competition with others. Chapters can compete for these awards by submitting entries to the Region Director. Awards in the Achievement category are: AMBUC of the Year, Project Manager, Community Service, Local Charities, Newsletter, Visibility, Therapist of the Year and District Governor Newsletter. [Award Guidelines](#) and entry forms are available online.

Merit Awards. Merit awards recognize chapters which achieve excellence in performance. These awards are automatically calculated based upon AMBUCS Resource Center records for the chapter year June 1 - May 31. Merit awards are listed in the Award Guidelines online.

GREAT SOURCES OF INFORMATION:

AMBUCS NEWS. AMBUCS News is delivered electronically to all AMBUCS members each month. Covers important topics for the entire AMBUCS organization. It now includes information formerly included in "The Leader," for chapter, district and regional officers.

AMTRYKE CATALOGUE. Published in print and electronically as evolving product demands.

AMBUCS MAGAZINE. A quarterly AMBUCS Magazine is published in print and digitally.

WWW.AMBUCS.ORG. The AMBUCS website is another great source for information. Here you can find the chapter officer directory, conference information, program updates and member resources. www.ambucs.org

CHAPTER DIRECTORY. This is a highlight of our website. The chapter directory appears on a map. You can search to see chapters in an area and when you click on a chapter, viewers will see chapter leader contact info (as given to the ARC in Form 128).

NATIONAL AMBUCS FACEBOOK PAGE. If you need a bit of a pick-me-up, the national facebook page is a great place to visit. Full of smiling faces and lives changes and chapter successes. You'll find us at www.facebook.com/NationalAMBUCS

▶ CHAPTER PRESIDENT

The President leads chapter meetings and chairs board meetings. More importantly the

President is the head motivator, delegator, empowerer and cheerleader. They bring people together for a common goal, give everyone a part to play and support their efforts. They also make sure the work of the chapter is moving forward by keeping in good contact with the people filling Key Roles or chairing committees. The President should be familiar with the chapter's bylaws and optional policy guidelines.

JOB DESCRIPTION

1. Head motivator, delegator, empowerer and cheerleader.
2. Runs chapter meetings.
3. Ensure that all required reporting is submitted to the Resource Center and/or state government offices accurately and in a timely manner.
4. Verify that Secretary and Treasurer roles are being performed according to bylaws to ensure sound administrative and financial management.
5. Serve as an effective channel of communication between regional/national offices and chapter members so that information flows well in both directions.
6. Ensure that the chapter presents itself in a positive light in the community at all times.

CHAPTER MEETINGS

PRESIDING. Members' interest in the chapter meeting depends in a large degree upon the morale, tone, quality of program or other efforts, and presiding ability of the President. He or she must conduct the meetings with intelligence, humor, and good taste, to the extent that the members enjoy bringing guests to the meeting because they are proud of the way their President handles the job. Off-color jokes and profanity will offend the members. A President's conduct and appearance are important.

Remember, you're competing with other organizations to attract volunteers. Your chapter is judged by them for purpose and structure as well as friendliness.

AGENDA PREPARATION. Each chapter meeting is chaired by the President. In his or her absence it is chaired by a designated vice President. Especially if your chapter meetings are formal, it is advisable to prepare an agenda and give it the time it deserves. Don't do it haphazardly and from memory, hoping to get everything in and accomplished. Get down in writing what you plan to do. Keep your members informed of coming events by having thumbnail reports from those filling [Key Roles](#) or committee chairpeople.

AGENDA TIPS:

1. Indicate time and order for each item.
2. Write down names of all persons to be introduced.
3. Don't leave anything to memory.

SUCCESSFUL MEETINGS:

- Your chapter may choose to not hold formal meetings. You may meet over the phone, online, at someone's home or in a coffee shop or restaurant. You may never (or very rarely) have a speaker. All of this is *perfectly* fine.
- The meeting must be opened on time and closed on time. Even if there are only three members in the room, start on time. Starting promptly will encourage on-time attendance. Delayed starts usually cause delayed endings.
- A friendly atmosphere is essential: Visitors should be cordially introduced and new members made welcome.
- If you have a program, the speaker is treated graciously before, during and after the meeting. The speaker should be advised in advance of the meeting how much time is to be allowed (20–30 minutes) and of the adjournment time. Courtesy demands the speaker be allotted the full time. If the speaker runs over time, tactfully stop the meeting, permitting those members to leave who must; allowing those members to stay who have the time. In thanking the speaker, don't try to sum up the talk. Thank him or her, perhaps present a certificate of appreciation and close the meeting. Some chapters give token gifts of appreciation.
- The meeting room and its atmosphere has a decided bearing on the meeting. A meeting place should be selected and prepared with care. The Secretary (or sergeant-at-arms if you use a committee system) is usually responsible for seeing that the meeting room is properly set. Of course a friendly attitude will go a long way to counter-balance any possible downside to a location, say, the background noise of a restaurant.

▶ CHAPTER SECRETARY

The Secretary is the administrative officer of the chapter. The Secretary keeps the chapter records up to date: membership reporting activity, bylaws and corporate status of the chapter. Or in other words, the Secretary is in charge of keeping up with members and the legal status of the chapter.

JOB DESCRIPTION.

1. Be the "guardian" of the chapter's records – past and present – that may be needed to support claims of legal standing, longevity, contributions in the community, ownership, compliance, grant eligibility, etc. Essential records include, but are not limited to, copies of the chapter bylaws, articles of incorporation, solicitation certification, financial audit reports and member contact information.
2. The Secretary should be the chapter's expert on its bylaws. Good governance practice is to make sure your chapter activities align with your bylaws. The standard bylaws should not be changed, since those are approved by the IRS for the Group Tax exemption. If your chapter

needs additional guidelines, put those into your chapter policy documents.

3. Notify the Resource Center on changes regarding members and progress toward chapter goals to confirm eligibility for corresponding recognition and awards.
4. Bring celebratory attention to important dates/anniversaries associated with the chapter and personal milestones and achievements related to individual members.

MEMBERSHIP ACTIVITY

All changes in your chapter's membership (additions, deletions) must be approved at a board meeting. Following this meeting, make the necessary changes in the chapter records as soon as possible. Submit Membership Application Form 126 and/or Membership Deletion Form 130 via the website (all [forms](#)).

OFFICIAL MEMBERSHIP RECORDS. A roster of your chapter's members is carefully maintained at the AMBUCS Resource Center, but it is only as accurate as the information supplied. Official ARC membership records are the basis for:

- Holding office in your chapter - you must first be an official member in the ARC's records.
- The quarterly Blue Chip Membership Report available online at www.ambucs.org.
- Quarterly dues invoice sent to the Chapter Treasurer based on Blue Chip numbers.
- The AMBUCS Magazine and electronic newsletters mailing list.
- The annual Program Giving Goal of \$40.00 per member is based on the official February 28th Membership Blue Chip report.
- Membership recruiting contest credit (Branding Time and Spring Round-Up).
- Big Hat sponsor credit.

REPORTING PERIOD. The reporting period for adding and dropping members is based on a quarterly system. The four quarters are:

1st Quarter: June, July, and August – Reporting closes *September 10th*

2nd Quarter: September, October, and November – Reporting closes *December 10th*

3rd Quarter: December, January, and February – Reporting closes *March 10th*

4th Quarter: March, April, and May – Reporting closes *June 10th*

MEMBERSHIP CLOSING. Membership closes on the 10th of the month following the last day of the quarter.

Any membership changes (adds or drops) must arrive at the AMBUCS Resource Center by the 10th. Information received late will be entered with current date and cannot be made retroactive.

ARC sends each chapter Secretary a current membership roster just before the end of each quarter. These should be checked against chapter records and the ARC should be advised of corrections prior to the close of membership.

LATE REPORTING. Additions and deletion forms received after the closing date will be attributed to the following quarter and cannot be made retroactive. This policy, set by the National Board of Directors, has a direct effect on a chapter in two areas:

1. Late deletion reports will cause the chapter to pay an additional quarter's dues on a dropped member.
2. Late additions can cause the chapter to lose awards for Blue Chip, Branding Time and Spring Round-Up.

OFFICIAL CONFIRMATION REPORTS. Every week, AMBUCS Resource Center processes batches of membership activity. When your chapter reports additions and deletions the Secretary and Treasurer are both emailed official confirmation reports of these membership changes. The new member confirmation is the invoice for the \$10.00 new member fee.

After you report new members, the President will be mailed member pins for presentation at your next meeting. Big Hat star pins will also be included in this mailing for sponsors.

Membership activity batches for the beginning of the quarter will be delayed until after the previous quarterly Blue Chip Membership Report is published. That means the membership activity in June, September, December, and March will not be processed until the end of that month. This delay is due to computer software limitations.

CHAPTER ROSTER

Quarterly, the AMBUCS Resource Center sends a roster of the chapter membership to the chapter Secretary. The roster details membership records, name, address and contact information of members. The purpose of this roster is to allow a periodic reconciliation of chapter membership records with the official ARC records. The Secretary should make necessary corrections or additions to the roster and return it to the ARC to be updated.

Secretaries will automatically receive a roster in August, November, February and May. Rosters may be obtained at any other time upon request.

MEMBERSHIP REPORTING FORMS

Returning the following forms ensures that we can get in contact with you and that your chapter info is reflected correctly on www.ambucs.org. These forms are submitted each quarter, generally by the chapter Secretary.

NOTE: Find all forms, both printable and online, on the website in the membership section under [Forms](#).

Form 126 - new/reinstated member application **Form 128** - newly elected chapter officers **Form 129** - officer changes

Form 130 - member deletions

Form 131 - member address change

FORM 126 NEW/REINSTATED MEMBER APPLICATION is available in two formats: 1) a printable version to mail or fax as well a 2) online form found on the website can be filled out and submitted electronically. It is important that the information on Form 126 is accurate, complete, and legible as it is used to establish a member's permanent record. It is advised that you allow the member to complete the top half of the printable form application. It's less work for you and ensures accuracy. This will allow you to complete the rest of the form and either mail, scan and email, fax, or submit the information online.

Below is an explanation of the questions you will find in form 126. You will request one of the following activities:

Add a New Member. A new member is someone who has never been a member of AMBUCS. The new member will be issued an ID number.

Reinstate a Member. A reinstatement is a former member of AMBUCS who has been readmitted to the same or different chapter after more than 60 days. A member thus reinstated is entitled to readmission upon payment of a reinstatement member fee. The reinstated member assumes his or her original ID number. Big Hat credit is allowed for the sponsoring member.

Transfer a Member. A transfer is a member, in good standing, who transfers membership to another chapter within sixty (60) days of dropping from their original chapter. No new/reinstated fees are charged and no Big Hat credit is given.

Transferring members must be dropped from the original chapter. Complete the "transfer from chapter" portion of the membership application and communicate with the original chapter's Secretary to ensure a smooth transfer.

Give Dual Membership. Dual membership in a second chapter generates another ID number, has no sponsor and does not receive Big Hat credit. If a dual member is also a Life Member, the member is only listed as a Life Member for one chapter. AMBUCS Resource Center keeps the Life Member designation with the member's original chapter and member ID number, unless the member advises otherwise.

If dual members are involved in chartering a new chapter, only ten percent of the new charter chapter members may hold dual membership at charter date.

You will tell us the type of membership.

Active member. Active status is a member designation for national and chapter dues billing. An active member will be counted on the quarterly Blue Chip membership report and be billed quarterly national dues. Chapters can use this status to bill the member full chapter dues.

Associate member. Associate status is a member designation significant only for chapter dues billing. An Associate member will be counted on the quarterly Blue Chip membership report and be billed quarterly national dues just like an active member. Chapters can use this status to bill the member an adjusted dues billing (for instance if they do not attend meetings that include food).

Honorary. The chapter may elect honorary members that the chapter desires to confer special distinction on. Member is not required to pay member contributions of any kind. They will not be listed on the active roster of the chapter.

Emeritus. An emeritus member is one who has been a member for 20 years or longer, who is no longer able to attend meetings of the chapter regularly because of permanent physical disability. The member must be a member in good standing at the time of election to emeritus membership. Emeritus members may not vote or hold any elected office.

Military Service. Military service membership may be granted to a member entering a branch of the armed forces who is thereby unable to attend chapter meetings. Upon notice to ARC of the change, the member shall be deleted from the national rolls and chapter roster. District or National member contributions will not be payable during active military service. Upon completion of active military service, the member will notify the chapter of intent to resume active membership within 90 days after completing military service. Upon notification to the National Office, member will be reinstated with no additional fee charged. Alternately, the chapter can elect to take over paying the member's national dues and keep them on the chapter roster.

Life member. When a member has completed the payment for Life Membership, the member moves to the Life Member status and national dues will no longer be billed; beginning with the next quarter. The chapter will no longer be billed for the member's national dues. A life member is counted on the quarterly Blue Chip membership report. Chapter Presidents will receive a Life Member plaque and Life member pin for presentation to the member.

Remaining question explanations:

Sponsor's ID number. The sponsor's ID number is the ID number of the member who sponsored the new or reinstated member.

Member ID number. Member ID numbers are assigned by the AMBUCS Resource Center. The new member's ID number will appear in the Secretary's New Member Confirmation and Invoice, chapter rosters generated by the ARC and the member's membership ID card. Transfer and Reinstated members keep their original ID number.

Sponsor's chapter. The sponsor's chapter section needs to be completed only if the sponsor belongs to a chapter other than yours.

Membership Effective Date. The date is the date that ARC records the new member, based on chapter submissions. Forms received after closing dates cannot be made retroactive.

FORM 130 MEMBERSHIP DELETIONS.

Below is an explanation of the questions you will find in form 130.

Deletions occur because of:

- Resignation
- Transfer
- Death
- Suspension (owes back dues)

If the deletion is because of resignation, death or suspension, check the appropriate box. If the deletion is because of a member transferring to another chapter, enter the chapter's name in the *Transfer To* section. If the chapter is not known, place an X in that section. If the member resigned because of moving to another community, please provide a forwarding address (if known) in the *Moved To* block. The ARC will check for an AMBUCS chapter in the new community and notify that chapter.

Dropped officers. If the deletion is an officer in your chapter, please note this on the form so that information and materials can be redirected to his or her replacement. Submit Form 129 Report of Officer Change.

FORM 135/136 - REPORT OF CHARITABLE GIVING AND ANNUAL REPORT must be completed and filed electronically by November 15. This form is mandatory.

- Report of Charitable Giving. Provides a capsulated view of the chapter's community service for the year. Collectively, this information illustrates the magnitude of your chapter's community service, the human resources expended and the financial value.
- Annual Report. Collects data from chapters concerning good governance and best management practices. As a charitable nonprofit organization, we strive for transparency and ethical practices. The form serves to certify compliance with applicable rules, laws and regulations concerning our member chapters.

▶ CHAPTER TREASURER

The Chapter Treasurer is the financial officer of the chapter. His or her responsibilities are of vital importance to the chapter's successful operation. In preparation for your year as Chapter Treasurer, read your chapter's bylaws carefully. The bylaws and optional chapter policy are broad workable documents which set forth the rules and regulations under which your chapter operates. It outlines the limits of chapter operation. You and your chapter President will be well advised to know these limits, for it promotes the democratic process within the chapter. You should have a copy in your chapter's files. If not, request a copy from the permanent files of the AMBUCS Resource Center. The Treasurer is responsible for keeping the chapter's financial accounting in order and safeguarding the chapter's funds.

JOB DESCRIPTION

1. The Treasurer reports to the board and chapter about the status of the chapter's finances, including actual expenditures and income compared to budgeted amounts.
2. Provides a consistent voice for fiscal conservatism and analytical decision making within the board.
3. Attends all chapter and board meetings.
4. Manages the bank account. Your chapter should track operating expenses and charitable funds separately.
5. Uses a bookkeeping system to record your group's income and expenses.
6. Documents every bookkeeping transaction.
7. Provides an expense reimbursement policy and an expense reporting form.
8. Provides an annual budget and an annual financial review.
9. Gives a yearly Treasurer's Report printed in your chapter newsletter.
10. File appropriate 990 with IRS within four months after the close of your fiscal year (either October 15 or May 15).
11. Meet any reporting obligations required by your state. These may include charitable registrations and reports by nonprofit corporations.
12. Form 135/136 - Report of Charitable Giving and Annual Report due November 15.

THE CHAPTER TREASURY

Initial audit. Each incoming President and Treasurer should make it standard procedure to see that each chapter fund is being handled in a business-like manner. They should insist upon an informal review or audit being made of the books before taking over the responsibility of their offices. Perhaps most especially if the timing is unusual, say, because the position was unexpectedly vacated. The audit need not be a formal audit conducted by a CPA firm. It can be a qualified chapter member. The Treasurer should offer bond to be paid by the chapter.

Yearly audit. For the yearly audit, the Treasurer should deliver to the chairperson of the Audit Committee, the following materials:

- Checkbook
- Bank Statements and canceled checks
- Cash Book and Journal
- Paid bills
- Deposit slips
- Copy of monthly financial statements
- Any other material requested by the committee

When the audit has been completed, the Treasurer's Annual Report and the Auditor's Report are presented for acceptance to the Board of Directors. The financial information in the annual report is to be used to complete IRS Form 990 (due four months after the close of your fiscal year – either October 15 or May 15).

Transparency. The Treasurer should provide bank statements to the board or a member with financial acumen each month. These statements should be signed off on and kept for five years. It's prudent to always have two other members count, record and document funds prior to depositing. The ARC recommends that all chapters require two signatures on each check. Please see full section above in the Executive Board section.

Two funds. Chapters should maintain an operating fund and a charity fund. Separate bank accounts are not necessary, but funds should be accounted for in this manner. Chapter dues and fees are paid out of the operating fund, and all usual chapter expenses are also funded from it. Income from fundraising projects is placed in the charity fund which is used only for community service projects approved the membership. **Additionally, funds may only be used for the purpose stated when they were raised.** If the campaign was to put kids on trykes, you must use the funds to put kids on trykes. If it was raised for scholarships, it must be used to provide scholarships. If it was given for 100% Program Giving, it must be used for 100% Program Giving.

Bank deposits. Bank deposits should be made as often as possible and in such a way that all deposits serve as a double check on money that has been turned over for deposit. Make sure every donor receives an acknowledgement letter (see [Fundraising](#) section for an example) and tax receipt (where applicable).

GROUP TAX EXEMPTION

AMBUCS Group Tax Exemption - Group #8069. National AMBUCS, Inc. was issued a group tax exemption under IRS code 501c3 effective December of 1994. Local chapters of AMBUCS qualify under that group exemption as a bona fide 501c3 tax exempt organization. All newly chartered chapters are automatically included in the group tax exemption.

ARC will apply for newly chartered chapters' EIN (Employee Identification Number). Chapters may NOT file for EIN numbers independently but must, instead, allow the ARC to apply - in order

to be included in the AMBUCS' Group Tax Exemption.

Chapters should follow the directions in the New Chapter Instructions provided by the ARC. This clearly lays out the necessary steps chapters must take to complete their qualification as a bona fide chapter of AMBUCS' group exemption. These steps include:

- Adoption of Affiliation Agreement
- Adoption of Standard Chapter Bylaws
- Adoption of Chapter Policy Guidelines (optional)

The ARC will file articles of incorporation for your chapter in the state where chapter is located.

Form 990. Normal rules apply for filing the Form 990, which is the tax return for nonprofit organizations. All chapters must file a Form 990 or 990 EZ if their gross receipts are over \$50,000 in a year. All chapters may instead file a 990-N e-postcard if their gross receipts are under \$50,000. Gross receipts include all contributions, dues, and gross revenues from fundraisers. These forms are due to the IRS within four and a half months of the end of your fiscal year - either October 15 or May 15. (see [Governance](#) Section.)

Chapters should be careful to comply with all rules and regulations concerning charitable contributions. Obtain the latest information from the IRS.gov website.

NATIONAL FEES, DUES & INVOICES

1. Fees

- **New member fee.** The new member fee is \$10. New member fees will be invoiced near the end of the chapter set up process. The invoice is emailed to the chapter Treasurer and a copy is also sent to the chapter Secretary.
- **Reinstated member fee.** The fee for reinstatement of a former member is \$10 (see Reinstatement definition above). The \$10 admission fee will be invoiced at the time of the reinstated members join date. The invoice is emailed to the chapter Treasurer and a copy is also sent to the chapter Secretary.
- **Transferring member fee.** There is no fee to National AMBUCS for transfer of membership from one chapter to another, providing the transfer is completed within sixty (60) days. After sixty (60) days, a reinstatement fee is required. (See transfer definition above).
- **Chapter liability Insurance.** Chapters are billed in advance \$26.00 per quarter for Chapter Liability Insurance.

2. Dues

- **Billing of National dues.** \$25.00 yearly, billed at \$6.25 quarterly. Quarterly membership statements are sent to you about the 15th of the month following the close of the

quarter. A quarterly dues invoice is included. Chapters are billed in advance for each quarter for all active members of record (Blue Chip Report). AMBUCS Resource Center records are considered official and billing is based on those records, as shown on the quarterly Blue Chip Report. NO ADJUSTMENTS ARE ALLOWED. This is why it is so important that a chapter keeps its records current with the ARC.

Payment is due upon receipt. This expense does not require board action, and should be paid as soon as possible. Checks are payable to National AMBUCS.

Delinquent National dues. National dues are considered delinquent if unpaid in thirty (30) days. A 2% late charge will accrue every 30 days for each past due invoice. If your chapter is declared "nearly not in good standing" the President is requested to contact the Treasurer and have the payment mailed to be received in the ARC by the 1st of the coming month. If National obligations remains unpaid at the end of the quarter, the chapter automatically loses its "good standing." Meaning, it is not eligible to vote in national or district activities or at conferences or to make Amtryke purchases. Upon payment of obligation, the chapter will automatically be reinstated to "good standing" in the organization.

- **Chapter Friends Dues and Renewals.**

Friends Individuals - membership renewal \$25.00 (dues) billed directly to the Friend member.

Friends of Chapters - membership renewal \$25.00 (dues) billed directly to the chapter.

Friends by Sponsor - membership renewal \$25.00 (dues) billed directly to the sponsor of the Friend member.

Friends Members are processed when their first \$25.00 annual membership (dues) contribution is received by ARC. Payment must be received before membership is recognized. Your chapter receives Scorecard credit for Friends affiliated with your chapter or sponsored by your members.

Friends members are then billed \$25.00 annually for a renewal. The billing is directed to the various parties based on the Friend member type. Therefore, it's imperative that AMBUCS Resource Center have the correct status for each Friend member.

- **Additional magazine subscriptions.** Some chapters ask that their Honorary and Emeritus members receive the AMBUCS Magazine. At the beginning of the fiscal year, June 1st, a statement of \$12 per number of these members is billed to the chapter.
- **Official Confirmation Reports.** Membership additions and deletions are verified

through emailed confirmation reports (New Member Invoice or Dropped Member Confirmation).

3. Invoices

- **Amtryke invoices and AMBUCS Invoices.** A numbered invoice is sent for each order from Amtryke and from the AMBUCS Store. Invoices are due upon receipt; a 2% late charge will accrue every 30 days for each past due invoice. For a chapter to be considered in "good standing" all Amtryke and AMBUCS invoices must be current. Amtryke and AMBUCS Store invoices are payable to Amtryke, LLC.

Note: Every 30 days you will receive a statement from us to help you stay on track. Statements are not billable. Invoices are.

CHAPTER BUDGETING

Member Dues to the Chapter. Each chapter must have an adequate dues structure to operate. If dues and admission fees are too high, people cannot afford to belong. If dues and admission fees are too low, the chapter cannot perform its services for the members. The old rule of thumb was that chapter dues be at least \$10 per month (plus meals if desired) but you may well find this is too much. When determining your chapter's dues and your annual budget, be sure to include the cost of district and region dues. If you're not sure what those amounts are, feel free to contact your district governor or region director.

Some possible operating expenses of the chapter could include software licenses, office supplies, fundraising expenses, speakers' gifts, Treasurer's bond, or conference expenses for the officers and members. Standard items for inclusion in a budget are listed on in the Basic Chapter Budget Template on the website under [Admin Documents](#).

TIP: We recommend the chapter collect the \$25.00 yearly national dues from each member all at one time and then write one check for \$6.25 times the number members to national each quarter.

Billing. Chapter membership dues are payable in advance and usually are billed monthly or quarterly.

It is important that statements be mailed / emailed regularly and promptly. It is equally important that no member be permitted to be more than two months in arrears. Establish a workable chapter policy on this point and adhere to the policy.

Delinquent dues. When these instances arise, the Treasurer must notify the Board. An Executive Board member would then call upon the delinquent member to find out what's wrong and either collect delinquent dues or report suggested action on the member to the Board. Non-attendees and delinquent dues payments most often go hand in hand. Your chapter should work diligently to

reactivate members when possible. Remember, it is easier to save a member than to get a new one.

Socials (optional). The chapter should have a policy as to the collection of any assessment for chapter socials. The policy should be strictly adhered to for each and every member.

Make sure one person or a group of people are responsible for selling tickets and collecting social assessments before the event. This helps in making food guarantees to the caterer. When pre-event tickets are sold, the Treasurer need only deposit the sales when receiving a complete recap of the event as to income and expenses.

Or your socials can be much less formal: going Dutch at a restaurant, a potluck, or paying for your own pour at a winery, etc.

DISTRICT DUES

Chapters also pay per capita dues to its district if they are located within a district. The District Secretary Treasurer sends statements of the dues on a quarterly basis, based on your chapter's Blue Chip total. Prompt payment should be remitted to the District Secretary Treasurer. Life Members are not exempt from district dues.

REGION DUES

The Region Director bills the district for dues to the region. Therefore, when your chapter pays its district dues, part of that amount goes towards reimbursing the Region Director for region expenses. If your chapter is not in a district, the region director will send a region dues invoice to the chapter. Not all regions have directors. A region must contain at least 250 members before gaining representation on the National Board.

A chapter not in good standing with the region, due to being in arrears, is also not in good standing with the national organization. There is a procedure in place for disputes and to help chapters get back on track. Please feel free to [contact](#) your region director, [AMBUCS executive director](#) or any member of the Executive Committee.

Regional Training Conference assessment. Some regions have a policy of assessment to defray the cost of the annual regional training conference in the spring. It is designed to protect host chapters financially, and to keep registration costs low. Ask your Region Director or district officers about your region's policy.

BIG HAT CLUB (BHC) DUES

On the 2nd quarter dues billing, you will receive an additional charge from National AMBUCS for annual BHC dues if members of your chapter have chosen to belong. These funds are used to pay for awards, pins, hats, etc. The current fee, as of June 1, 2013, is \$10 per year for each Big Hatter on the Blue Chip Membership Report as of June 1st of that chapter year and is payable to the AMBUCS Resource Center. A late fee of two dollars is assessed if the bill is unpaid by November 15th.

YOUR PATH TO THE NATIONAL PRESIDENCY

READY TO LEAD? Here's the path to the presidency. It has been streamlined over the years to remove roadblocks and encourage new leaders.

1. Three (3) years of membership
2. Serve a full term as Chapter President
3. Serve as Region Director

So, how do I become a Region Director? National AMBUCS is governed by a board of directors. They come onto the board in several ways and are meant to be representative of the membership.

- Six (6) members are elected by their respective regions; called Region Directors. Three (3) are elected each year for two year terms. This staggers the turnover of board members and seeks to provide continuity.
- Three (3) are National Officers. The National President and President-elect are elected at AMBUCS National Conference. The last position is filled by the immediate Past National President.
- The National Big Hat Club President serves as a voting member of the board of directors. The National Big Hat Club Vice President attends meetings but is not a voting member.
- There is one (1) at-large position allowed. It is appointed by the board of directors and targets a skill set that would benefit the organization.

If this is a path you are interested in, please talk to your chapter President and region director for mentorship. If you have served as chapter President and are interested in serving on the national board, please also call the ARC.