Chapter Leader Onboarding Handbook

Introduction

First and foremost, thank you! Your decision to take the next step in leadership and participating in your chapter's board is a testament to the dedication you have to yourself, your career, and your profession.

We're Here For You!

At ACRP HQ, we are here to support you! Please don't hesitate to reach out with any questions that you may have via one of the contact methods provided below.

Chapter Leader Resource Center: https://acrpnet.org/chapter-resource-center/

ACRP HQ Chapter Support Contacts:

Kelsey Fredkin
Manager, Engagement & Experience
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chapters@acrpnet.org

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Director, Engagement & Experience
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Association of Clinical Research Professionals
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703.254.8100 (phone)
email: chapters@acrpnet.org
website: www.acrpnet.org

About ACRP

With more than 16,500 members, the Association of Clinical Research Professionals (ACRP) is the only non-profit solely dedicated to representing, supporting, and advocating for clinical research professionals.

Founded in 1976, ACRP is a registered 501(c)(3) charitable organization whose mission is to promote excellence in clinical research and whose vision is that clinical research is performed ethically, responsibly, and professionally everywhere in the world.

ACRP is moving the people and practice of clinical research forward by:
- Being the most passionate advocate for the clinical research profession
- Providing the tools clinical research professionals need to build their own career journeys
- Creating connections through community
- Giving employers the confidence to know they're hiring the best of the best
- Leading the way for workforce development in clinical research

Learn more about ACRP including our DEI statement and guiding principles, our Board of Trustees, our various committees, and our members.

About ACRP Chapters

The primary role of an ACRP chapter is to provide an effective means for:
- Fostering outreach with the local clinical research community
- Fostering localized networking opportunities for members
- Supporting ACRP's strategic objectives

In addition, an ACRP chapter can support:
- Increasing member awareness of ACRP Global news and activities
- Providing improved access to ACRP resources, including certification and continuing education credits.

ACRP Chapter Leader Requirements

To maintain chapter affiliation with ACRP, your chapter must meet these requirements:

- The chapter must ensure all chapter members, including chapter leadership, are both ACRP Global and chapter members. The chapter may not have chapter members who are not members of ACRP Global.
- The chapter must comply with federal and state reporting requirements.
- The chapter must ensure that the acting chapter board has access to the chapter's bank account.
- The chapter must maintain a minimum of 25 members throughout the year.
- The chapter must provide at least two (2) activities per year for members. ACRP suggests holding meetings or events for members every two to three months; this frequency builds the morale of the group and creates a more active and engaged membership.
- At least one representative of the chapter board must be the point of contact for ACRP HQ and attend every chapter leader teleconference (held quarterly).
- The chapter must maintain a current web presence on the ACRP Online Community with up-to-date information and communicate with chapter members on a regular basis.
- All chapters are required to submit a CASE report on or before January 15, annually.

ACRP Chapter Annual Reporting (CASE Reporting)

The Chapter Affiliation Standards & Expectations (CASE) report is completed annually by the chapter to help you in planning for the coming year, and to give ACRP HQ a snapshot of your activities, to help us know how to best support you. Prior to completing it, we encourage you to meet with your chapter leadership team to develop a manageable plan for the year ahead that will incorporate activities your members will be most interested in. ACRP depends upon each chapter to operate in a professional manner; effectively manage finances; maintain affiliation standards; communicate with members, the community and ACRP, and promote ACRP. CASE, designed to ensure a stronger synergy between ACRP HQ and chapters, helps us measure that and ensure that chapters deliver consistent benefits to members.

ACRP HQ SUPPORT

Chapter Leadership Calls & Newsletters

ACRP HQ has quarterly chapter leader calls, which gives all chapter leaders the opportunity to hear what's going on at ACRP and to connect with other chapter leaders. All chapter board members are invited and a minimum of one member of each chapter's board is encouraged to ensure that all news is known to all chapters.

ACRP HQ also provides chapter leaders with frequent newsletters throughout the year that include reminders, engagement ideas, and announcements.

Survey Support

If you would like to survey your chapter members on a topic (i.e., you gather information about the kinds of events your members want), ACRP staff can help by developing a survey form. Staff will provide the survey results once the survey closes. To request this support, please contact chapters@acrpnet.org.

Election Support

For your chapter's annual elections, we can facilitate both nominations and elections, depending on your needs. Once nominees have been selected for the election, we can create, distribute, and tally

ballots, sending you result without any identifying information. To request this support, please contact chapters@acrpnet.org.

ACRP Chapter Governance

It is important for every board member to understand the chapter history and requirements set forth by ACRP. When you first join the chapter's board, we recommend you fully read the chapter's current bylaws and affiliation agreement. Also, all board members should review the bylaws on an annual basis and confirm that all requirements are met, as well as if bylaws need to be changed.

There are three governance requirements for chapters to be incorporated and current with their non-profit IRS filing.

- All chapters that are incorporated are required to file the 990 with the IRS. Most chapters file the Form 990N, a simple online form, to comply. You can find more information on filing this here: https://www.irs.gov/charities-non-profits/form-990-resources-and-tools; ACRP staff will remind you of this filing ahead of the due date each year.
- ACRP includes you in our group 501(c)3 umbrella status if your Form 990 filing is up-to-date; this means your chapter is designated a 501(c)3 charitable entity by the IRS. The IRS askes ACRP HQ to update our group exemption list annually.
- For incorporated chapters, there are a variety of requirements dependent on the state, please check with your Secretary of State to confirm that your chapter is current, if none of your leadership team knows that status.

ACRP Chapter Finances

Please ensure that your chapter board has access to your chapter's bank account and keeps track of expenses, revenue, any budgets you develop, etc. You will need to report on your chapter's finances in the CASE report.

Chapter dues are collected on www.acrpnet.org when a member joins or renews their membership. ACRP staff distributes dues to the chapters on a quarterly basis, with an accompanying breakdown of these payments being distributed via email to the chapter's president and treasurer. If you don't receive the payment once the chapter has received the breakdown (or the chapter has changed their accounting information), please let ACRP know as soon as possible at chapters@acrpnet.org.

ACRP Chapter Communication & Marketing

Consistent messages that include a clear call-to-action are the foundation of communications and marketing.

If you're struggling with how to reach your members, or if your messages aren't connecting, please visit reach out to us and we're happy to talk through this with you.

E-mail Marketing Messages

Chapter leaders can receive monthly chapter rosters from ACRP HQ including email addresses of your members for communications purposes. A Privacy Agreement must be completed by all chapter leaders who wish to receive the rosters. Please contact chapters@acrpnet.org to request the privacy agreement. The chapter roster may be used to distribute information about upcoming chapter events, support for the chapter leadership if needed, and any sort of communication that the entire chapter would want.

Website

All chapters have a webpage within ACRP's Online Community (http://community.acrpnet.org); no external websites will be linked from the ACRP main page. To best capture the spirit and activities of your area, each chapter can tailor their webpage to suit their needs. Updates to chapter webpages are the responsibility of the chapter.

Logo Use

Upon the issuance of the chapter's charter by ACRP, an approved chapter may use the ACRP name, acronym and logo "Association of Clinical Research Professionals" on its literature, stationery and in certain other respects, in accordance with and subject to the terms and conditions of the Affiliation Agreement. ACRP will supply each chapter with a specifically designed chapter logo by request. As stated in the chapter affiliation agreement, chapters are prohibited from designing their own logos.

ACRP Chapter Events

ACRP recommends that a chapter holds at least two (2) events a year, either in person or virtually. When putting events together, keep the following in mind:

- Do you want an event that offers contact hours, or a non-contact hour event such as a happy hour or career fair? If you are planning a contact hour event, are you using a live speaker or ACRP-created content?
- Topic — In looking at topics for your events, consider the following:
  - Hot topics in the industry
  - Topics that are specific to your local community
  - Does a topic lend itself to a group rather than an individual speaker?
  - Do you want to consider an alternate event topic, such as a book or movie club or a topic-led conversation?
  - Event speaker — do you have individuals in your chapter that can speak to the topic you want to present? Do you need support?
- How do you want to market the event?
- How frequently do you plan to hold events for your chapter?

ACRP offers chapter event support in the following ways:

- Support for contact hour processing, including approval for the contact hour and support for evaluation through our Learning Portal

- Support for online chapter event registration through the ACRP registration system (funds collected for the event would be sent to you on a quarterly basis along with your member dues)
- Hosting a chapter event page for promotion (through the Online Community's chapter's community)
- Inclusion of a chapter event on the ACRP event calendar on the website

All of this support can be requested through the Chapter Event Application Form.

All chapter event support materials can be found in the Chapter Leader Resource Center.