

2018



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# Chapter Affiliation Standards & Expectations (CASE) Planning Workbook

ACRP CHAPTER SERVICES  
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## Welcome Letter

Dear ACRP Chapter Leader,

Welcome to the 2018 Chapter Affiliation Standards & Expectations (CASE) Planning Workbook. This workbook is designed to help chapters prepare to submit the annual online CASE submission form. CASE focuses on outcomes from chapter-initiatives

The online CASE submission itself will consist of two (2) parts:

**Part 1: Annual Update** – Focusing on the chapter’s demographic information.

**Part 2: CASE (Basic Requirements)** – A self-reporting assessment of chapter’s achievements and adherence to chapter affiliation requirements.

The CASE submission reports on a chapter’s activities and accomplishments during the prior calendar year (January – December). **The deadline for submitting the online CASE survey is January 31.**

Chapters will be rewarded with ACRP funding based on membership recruitment and retention results in the reporting year. To qualify, each chapter must submit the online CASE report and all supporting documents 1) Current Chapter Board Roster (*using the “[Chapter Board Roster Template](#)” spreadsheet*), 2) Strategic Plan for the upcoming year, and 3) year-end financial results for the period January 1<sup>st</sup> – December 31<sup>st</sup> of the reporting year by the January 31<sup>st</sup> deadline.

Eligibility for financial incentives will be based on the following membership metrics **as well as** adherences to the Chapter Affiliation Standards & Expectations (CASE) requirements:

Membership Increase Percentage	Chapter Bonus Amount
3 – 5%	\$250
6 – 9%	\$500
10% +	\$800

Please make sure to identify the chapter leader responsible for submitting the CASE survey.

If you need additional information about the CASE submission process, please contact [chapters@acrpnet.org](mailto:chapters@acrpnet.org).

Thank you for your ongoing time, commitment, and leadership!

ACRP Membership

**PART ONE: Annual Update**

Part 1 of the CASE submission is the Annual Update. This section provides information about your chapter such as membership, financial performance, and progress towards goals.

You will be asked to provide information and/or answer the following questions when completing Part 1 of the online survey.

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**1. Is your chapter incorporated?**

Yes  No

If yes, are your current board officers recorded within your incorporation documents?

Yes  No

If no, is your registration with your state current?

Yes  No

**2. Does your chapter pay for any administrative help, such as a management firm, or other administrative service?**

Yes  No

**3. Approximately, what was your chapter's gross revenue from all sources in the reporting year (dues, registration fees, sponsorships, etc.)?**

NOTE: This information is needed for ACRP tax reporting to the IRS and will not be shared.

\$ \_\_\_\_\_

*The following eight (8) questions are specific for US chapters. If your chapter is outside the US, the IRS should be replaced with the Federal Tax Agency in your country.*

**4. What is your chapter's Employer Identification Number (EIN)?** \_\_\_\_\_

**5. Is your chapter recognized by the IRS as a 501 (c) 3 organization?**  Yes  No

**6. If no, what is your IRS tax status?** \_\_\_\_\_

**7. Did your chapter file Form 990  or Form 990N (postcard)  with the IRS in the reporting year?**

If yes, please upload documentation of IRS submission. This can be saved from

<https://www.irs.gov/charities-non-profits/tax-exempt-organization-search>.

If no, why not, and when was the last time your chapter filed the appropriate tax returns with the IRS?

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8. **If no, is your chapter currently working with the IRS to be recognized as a tax-exempt organization?**     Yes     No
9. **How many chapter members did your chapter have as of December 31 of the reporting year?**  
Please reference your Online Community to get this number.
- Less than 50
  - Less than 100
  - 101 – 200
  - 201 – 300
  - 301 and greater
10. **Compared to 12/31 of the previous year, describe the trend you saw in your chapter membership over the current reporting year.**
- Increase
  - Decrease
  - No Change
11. **Did your chapter raise dues in the reporting year?**
- Yes  No
12. **Does your chapter plan to raise dues in the next reporting year?**
- Yes  No
13. **Did your chapter have a half-day or full-day conference, seminar, or other large event in the reporting year?**
- Yes  No
14. **Will your chapter have a half-day or full-day conference, seminar, or other large event in the next reporting year?**
- Yes  No
15. **Did your chapter partner with another membership organization during the reporting year? (, ASCO, API, AACR, etc.)**
- SoCRA  ASCO  Other \_\_\_\_\_
16. **Did your chapter partner with an educational institution in the reporting year?**
- Yes  No
17. **Does your chapter have an ACRP Certification study group or offer a Certification Prep Course?**
- Yes, in this reporting year and planning for next reporting year
  - Did not do in this reporting year, but planning for next reporting year
  - Did in this reporting year, but not planning for next reporting year
  - Did not do in this reporting year and not planned for next reporting year
18. **Does your chapter have an Online Community Administrator?**  Yes  No
19. **If so, has the person receive training for the role?**  Yes  No

**20. Which of the following does your chapter have? Please select all that apply and include the URL**

- A LinkedIn group - URL \_\_\_\_\_
- A Facebook group - URL \_\_\_\_\_
- A Twitter feed - URL \_\_\_\_\_
- Instagram - URL \_\_\_\_\_
- Other \_\_\_\_\_
- None of the above \_\_\_\_\_

**PART TWO: CASE Survey (Basic Requirements)**

The Basic Requirements sections is a baseline of operations and will help your chapter build a stronger foundation for success. You will be asked to evaluate your chapter’s achievement of ACRP’s chapter affiliation requirements. Please mark “True” or “False” to each statement below to determine if your chapter achieved each requirement in the reporting year.

**Chapter Affiliation Standards & Expectations (CASE)**

	True	False
The chapter ensures all chapter members are both global and chapter members.	<input type="radio"/>	<input type="radio"/>
The chapter maintained a minimum of 25 members throughout the year. (If global chapter – the number of required members is 10)	<input type="radio"/>	<input type="radio"/>
The chapter provided at least two (2) professional development activities for members. <b>Activity 1 Title and Date</b> _____ <b>Activity 2: Title and Date</b> _____	<input type="radio"/>	<input type="radio"/>
The chapter maintained its ACRP Online Community on the ACRP website with up-to-date information.	<input type="radio"/>	<input type="radio"/>
The chapter complied with federal and state reporting requirements.	<input type="radio"/>	<input type="radio"/>

If any of the above statements are “False,” please explain the steps your chapter is currently taking to make it true.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How many hours did it take to gather the information to gather and complete the CASE survey? \_\_\_\_\_

How many hours did it take to complete the CASE survey once you compiled the appropriate information? \_\_\_\_\_

**Appendix A: Sample Chapter Strategic Planning Guidelines**

ACRP strongly encourages each of its chapters to establish goals and strategic initiatives to support the needs of clinical research professionals. These goals allow chapters to increase visibility and effectiveness as well as expand the chapter’s impact within the community.

**Creating your Chapter’s STRATEGIC PLAN**

Your chapter’s strategic plan should focus on: Education/Professional Development, Marketing, Communications, Membership, Certification, and Budget.

- Each chapter is required to submit at least three (3) total initiatives.
- A goal is not the same as an activity or task. For example, placing an order for ACRP marketing materials for a membership push is not an initiative; but, rather, would be part of a larger strategic initiative of increasing chapter membership.
- Preparing an annual budget for your chapter will provide your financial foundation for your strategic plan. Monitoring your performance against your budget will help you stay on target.

**How to Get Started**

When developing your initiative, it may be helpful to answer the following questions as part of how you look strategically at that goal:

- What is the purpose of your initiative?
- What need are you identifying and how will you help?
- How do you want to make an impact in this area?
- If this isn’t a new initiative, how will you improve upon earlier work?
- What resources will you access?
- What is your timeline?
- How is this initiative going to be communicated?
- How are you engaging your members?
- How will you know if you are successful?
- What measures will you implement?

Each chapter is encouraged to model the vision, mission and strategic goals of the global organization.

Below, please provide at least three (3) goals your chapter would like to accomplish in 2019:

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**Appendix B: Template - Year-End Financial Results**

Reporting of financial results is required by your chapter’s affiliation agreement with ACRP. You will NOT have to submit a separate financial statement. Reporting the information below will satisfy the reporting requirement.

NOTE: Be sure to file your chapter’s tax returns (i.e. federal returns 990, 990-EZ, 990-N) before the filing deadline.

<b>Chapter Revenue</b>	
Registration Fees	
Chapter Dues	
Sponsorship	
Donations	
Other	
<b>TOTAL CHAPTER INCOME</b>	0
<b>TOTAL CHAPTER ASSETS*</b>	
<b>Chapter Expenses</b>	
Events - Food and Beverage	
Events - Honoraria	
Events - Travel	
Board - Travel	
Board - Registration Fees	
Board - Food and Beverage	
Office Supplies	
Other	
<b>TOTAL CHAPTER EXPENSES</b>	
NET PROFIT/LOSS (income - expenses)	

\*"Total Chapter Assets" includes cash, CDs, money-market accounts, the market value of other investments such as stocks or bonds, property owned by the chapter (real estate), etc.

***If you have questions, or need additional support, please contact [chapters@acrpnet.org](mailto:chapters@acrpnet.org)***