



Association of
Nutrition & Foodservice
Professionals

2023-2024 VOLUNTEER HANDBOOK

WELCOME

Dear ANFP Member,

Thank you for volunteering!

Getting involved is a great way to make the most of your membership, develop your leadership skills, and advance your profession. ANFP is a stronger organization because of your dedication. Your hard work is appreciated.

We encourage you to use all resources that are available to you in order to have a successful term. Develop a team effort between state chapters and districts; frequent communication among state and district officers and membership will keep everyone involved and informed.

We hope you enjoy your time as a volunteer and share those experiences with others.

Sincerely,

ANFP Chapter Relations Staff



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TABLE OF CONTENTS

SECTION I | PAGE 5

Standards of Conduct

SECTION II | PAGE 7

ANFP Overview
Mission and Vision
ANFP Strategic Plan
Member Categories
ANFP Awards

SECTION III | PAGE 11

ANFP Chapters
How do Chapters Work?
Chapter Minimum Standards
Rebate Requirements
Rebate Structure
Affiliate Agreement
Bylaws vs. Policies & Procedures
Dissolution
Termination

SECTION IV | PAGE 19

Chapter Leadership Roles
Organizational Chart
Executive Committee
Chapter Leadership Roles
President
President Elect
Immediate Past President
Secretary
Treasurer
Treasurer Elect
Officer Installation Ceremony
Other Volunteer Leader Roles
Education/Program Chair
Membership Chair
Newsletter Editor
Nominating Chair
Vendor/Expo Chair
Spokesperson
Ways and Means Chair
Webmaster
Other Short-Term Roles

SECTION V | PAGE 27

Committees
Standing & ad-hoc committees
Audit & Finance Committee
Membership Committee
Nominating Committee
Education/Program Committee
Vendor/Expo Committee
Tellers Committee
Hospitality Committee
Chapter & District Financial Account Management

SECTION VI | PAGE 32

Resources for Chapter Leaders
ANFP *Connect* & Volunteer Resources
Chapter Portal
ANFP Sign and Table Cover
Chapter Leadership Team
ANFP Staff Contacts

SECTION VII | PAGE 35

Chapter Awards
State Achievement Award
Communications Award
Membership Award
Government Affairs Award
Diamond Award

SECTION VIII | PAGE 38

Chapter Tax Filings & Financial Management
Financial Oversight
DMA Doing Business as ANFP
Chapter Bonding and Liability Insurance
Tax Return & Federal Tax Identification Number (FEIN)
IRS Form 990EZ OR 990N E-postcard Filings
IRS Form 1099-MISC
IRS Form W-9
Chapter Financial Management
Invoice Payment
Accounting records
Bank accounts
Reconciling bank account
Raffles
Fundraising
Selling ANFP Merchandise
Excess Funds
Whistleblower Policy
Compliance Officer
Reporting Violations
Accounting and Auditing Matters
Confidentiality
Handling of Reported Violations
Open-Door Policy

TABLE OF CONTENTS

SECTION IX | PAGE 48

- Education Meetings
 - Upcoming ANFP Meetings
 - Prior Approval of Continuing Education
 - Planning for Chapter Meetings
 - Finances
 - Site selection
 - Criteria for meeting sites
 - Menus and meal cost
 - Exhibits
 - Cancellation Policy
 - Payment of Invoices
 - Signing a Contract
 - Topics
 - Speakers
 - Sample Proposed Program
 - Corporate Sponsors
 - Promotion/Marketing
 - Registration
 - Follow-up/Thank You Notes
 - ANFP Suggested Dress Code

SECTION X | PAGE 57

- Appendix
 - Chapter Rebate Requirements & Standards Checklist
 - Chapter Leader Assignments & Rebate Requirement Checklist
 - Meeting Planning Checklist
 - How to Access the Chapter Portal
 - Board Orientation Checklist
 - How to Maintain Financial Records
 - How to Use Parliamentary Procedure
 - How to Set-up Succession of Officers & Volunteers
 - How to Prepare Meeting Minutes
 - How to Set Goals
 - How to Run a Successful Election
 - How to Prepare a Slate
 - How to Deal With Conflict
 - How to Prepare for the State Achievement Award
 - How to Establish an Impact Team (Government Affairs)
 - ANFP Style Guide
 - How to Use the Chapter Portal
 - Chapter Portal Guide
 - How to Access Chapter Portal & Update Chapter Officer & Volunteers (Prior to 6-1)
 - How to Access Chapter Portal & Add Chapter Officers & Volunteers (Post 6-1)
 - How to Access ANFP member login, Chapter Portal & Award Nomination Forms

SECTION I

**STANDARDS
OF CONDUCT**

STANDARDS OF CONDUCT FOR ANFP VOLUNTEERS

Volunteering is not only fun, it is also rewarding and benefits you professionally and personally. As a volunteer, you will gain leadership skills that transfer to your professional and personal lives, foster teamwork, expand your professional network and build your resume by contributing to industry issues. While ANFP wants volunteers to learn and benefit from their experience, we also ask that they conduct themselves in a professional manner during their term while they serve as ANFP representatives.

As an ANFP volunteer, you are expected to:

- Use only legal and ethical means in all association activities.
- Use every opportunity to improve public understanding of role of ANFP.
- Promote and encourage highest level of ethics within the industry and profession.
- Refuse to engage in activities for personal gain at the expense of ANFP, the industry, or the profession
- Maintain the confidentiality of privileged information entrusted or known to me by virtue of my office or appointment.
- Maintain loyalty to ANFP and pursue its objectives in ways that are consistent with the public interest.
- Serve all members of ANFP impartially, provide no special privilege to any individual member and accept no personal compensation from the association, a member, or a vendor except with the knowledge and consent of my association's executive board.
- Always communicate association internal and external statements in a truthful and accurate manner.
- Cooperate in every reasonable and proper way with allied associations' elected and appointed leaders and work with them in the advancement of ANFP, the industry, and the profession.
- Recognize and discharge the responsibility of my elected or appointed office upholding all rules and regulations relating to ANFP bylaws and policies and procedures.
- Maintain the highest standard of personal conduct.
- Reflect pride in membership with ANFP by wearing pin and displaying certificate, if allowed by employer.

SECTION II

ANFP OVERVIEW

ANFP OVERVIEW

Association of Nutrition & Foodservice Professionals (ANFP) is a national 501(c)(6) not-for-profit association established in 1960 that today has nearly 14,000 professionals dedicated to the mission of providing optimum nutritional care through foodservice management.

MISSION	VISION
Build an inclusive and diverse community of experts in foodservice management and food safety through: education, advocacy, & research.	Enhance health and wellness through optimum nutritional care.

Statement of Core Values

PROFESSIONALISM	INTEGRITY	ADVOCACY	BEST PRACTICES
ANFP members are leaders who demonstrate the highest standards of their profession, adhere to a code of ethics, and pursue lifelong learning.	ANFP members demonstrate pride in their work and are respected members of the leadership team.	ANFP members are advocates for those they serve and demonstrate that they care about their health and quality of life.	ANFP members implement nutrition and foodservice best practices and impart that knowledge to those they serve and lead.

Board of Directors

ANFP is governed by a board of directors. The Leadership Development Committee recommends a slate of qualified members from officer and director positions of ANFP each year. A president and CEO reports to the board and oversees employees at headquarters. The national board and committees work with staff to determine strategic directions of the organization. For full list of national board and committee members, visit www.ANFPonline.org.

Strategic Plan

The following goals were approved by the board in April 2022 and took effect as of June 2023 and will remain in place until May 31, 2026, when a new strategic plan will take effect. For more information about the strategic plan, please contact 800.323.1908 or info@ANFPonline.org.

Goal #1 Members	Goal #2 Credential	Goal #3 Education	Goal #4 Innovation	Goal #5 DE&I
Members and prospective members find value, community, and support at the local, state, and national levels, resulting in an engaged and growing membership.	CDM, CFPPs are recognized as the experts in foodservice management and food safety. The credential is required in regulations and supported by employers and stakeholders.	ANFP is a leader in creating and curating resources to elevate the food and nutrition industry.	ANFP is a leader in innovation and continuously evolves to meet the needs of its stakeholders and members.	ANFP, as an organization and community, organically fosters a safe environment of diversity, equity and inclusion through the actions of members and stakeholders.

Membership

ANFP members work in hospitals, long-term care, schools, correctional facilities, and other non-commercial foodservice settings. The association provides foodservice reference, publications and resources, employment services for members, continuing education and professional development, and certification programs. ANFP monitors industry trends and legislative issues, and publishes one of the industry's most respected magazines.



CBDM is responsible for the CDM, CFPP Credentialing Exam. The actual exam is conducted by a nationally-recognized professional testing firm. The certification program is accredited by the National Commission for Certifying Agencies (NCCA).

www.CBDOnline.org



NFEF supports and strengthens the foodservice and nutrition profession through research, education, charitable and awareness-building activities, enhancing the profession's ability to improve individual and public health.

www.ANFPonline.org/about-anfp/foundation



ANFP publishes one of the industry's most respected magazines featuring cutting-edge topics such as medical nutrition therapy, food safety, leadership practices, technology, and staff training. Check out chapter news in each issue of *Nutrition & Foodservice Edge*!

www.ANFPonline.org

Categories of Membership

PROFESSIONAL Membership

Open to individuals that have graduated from an ANFP approved Nutrition & Foodservice Professionals Training Program or have passed the CDM, CFPP credentialing exam

ALLIED PROFESSIONAL Membership

Available to individuals who meet one of the following criteria: Hold a 2 year, 4 year, or advanced degree in foodservice, culinary arts, health care or related field. Has supervisory experience in food service. Has successfully completed a 90-hour state approved nutrition and foodservice course or a culinary arts program.

PRE-PROFESSIONAL Membership

Available to individuals meet one of the following criteria: Students enrolled in a nutrition and foodservice training or related program. Individuals with foodservice experience in a non-supervisory capacity.

RETIRED Membership

Available to active members upon turning age of 62 and provides documentation that confirms officially retired are entitled to be a retired member upon written application and payment of the required annual retired membership fee. Individuals may select Retired Membership (without certification) if they choose not to maintain their certification or Retired Certified Membership (includes certification) for those individuals that would like to maintain their certification.

CORPORATE PARTNER Membership

Open to organizations that provide products and services to the foodservice industry.

Please visit www.ANFPonline.org for additional membership information and member benefits.

ACE AWARDS

Be recognized for your hard work! Nominations for the ANFP awards program, celebrating CDM, CFPPs and those supporting the credential and industry across the country, will be recognized at ANFP events throughout the year. Open to all members, recipients receive a complimentary general registration to the related educational conference. Additional promotion and recognition may also be available.



National Awards - Members are recognized at ANFP's Annual Conference & Expo. Learn more at www.ANFPonline.org.

AWARD	RECIPIENT	CRITERIA
Ambassador Award	Non-Member	An administrator, dietitian, etc. who demonstrated commitment of the CDM credential and supports the nutrition and foodservice department leader through mentoring.
Becky Rude Excellence in Leadership Award	Members or Non-Members	An individual that demonstrates excellence in leadership through exemplary service, advocacy of the credential and dedication to ANFP, and exhibits qualities of an inspiring leader that leaves a lasting impact on ANFP, its members and the foodservice industry. Nominations will not be accepted by members. This is a staff-driven award.
CDM Spotlight Award	Recipient of the Chapter's CDM of the Year or CDM of the Month	Member that has received their chapter's CDM of Year (or equivalent award), or was named as the 'CDM of the Month' in <i>Edge</i> in 2018/2019.
Chapter Volunteer of Year Award		Recognizes an outstanding chapter volunteer that serves as a positive example to others, and whose dedicated service, time and efforts to the foodservice industry help to advance the mission of the ANFP at the state level.
Dining Distinction	Any Member	The dining experience can contribute significantly to the health and well-being of individuals; an optimal dining experience is more than "eating". It involved the nutritional value of food, the way food is presented, the environment in which food is presented, the human interactions that occur during the dining experience.
Distinguished Service	Any Member and/or Corporate Partner	Member has exhibited strong support for ANFP and its mission: Position the Certified Dietary Manager as the expert in foodservice management and food safety.
Horizon Award	Member who has practiced in the foodservice industry five years or less.	Recognizes members who are new to management, and who demonstrate a desire for future growth through conditions to their facility or community, or local chapter, and display leadership in fostering equality, diversity, and inclusion in the workplace.
Innovation Award	Any Member	Recognizes members who enhance their nutrition and foodservice operations through technology, program development, nutrition, operations, and/or creative use of financial management.
Legacy	ANFP member that has been a member for at least 15 years, and served 3+ years on a national committee/board and attended at least 3 ANFP regional and/or annual meetings within the last 5 years.	ANFP involvement and attendance at ANFP programming to include contributions to ANFP through consistent participation but not limited to annual meeting, regional meetings, leadership institute, and chapter programs.
NFEF Foodservice Department of the Year	Facility	This award honors an entire foodservice team for innovative practices or excellence in foodservice management. Nominations will be judged on teamwork, innovation, customer service and operational contribution.
NFEF Foodservice Education Innovator of the Year Award	Facility	This award shines a spotlight on unique training or education initiatives that a facility or company offers. One winner each year will be recognized, with their training practice/program highlighted in <i>Nutrition & Foodservice Edge</i> magazine.
Partnership Award	Company or Facility (Members or Non-Members)	Demonstrated strong commitment to the CDM credential and supports the nutrition and foodservice department leader.
Public Policy Leadership	Member or Congressperson	Exhibits strong support for efforts to change/strengthen public policy in the areas of nutrition, food, healthcare, public health.
Student of the Year Award	Student currently enrolled in an ANFP Approved Program who will sit for the exam within the next year (June 1 - May 31).	Recognizes a current student enrolled in an ANFP dietary managers program who exemplifies dedication, hard work and commitment to earning the credential and pursuing a career in the foodservice industry.

SECTION III

**ANFP
CHAPTERS**

ANFP CHAPTERS

How do ANFP Chapters Work?

ANFP is a national nonprofit organization, and nearly every state has an ANFP chapter. Each chapter is registered as a tax-exempt nonprofit organization with the IRS. Some chapters are divided into smaller areas called districts.

Chapters and districts are volunteer driven. These leaders form a board of directors, consisting of a president, president-elect, secretary, treasurer, and other important roles. Officers and committees promote the benefits of being active locally, such as growing a professional network and developing leadership skills. Chapter leaders are essential to the success and growth of ANFP.

	CHAPTERS	DISTRICTS
Boundaries	Almost every state is an ANFP chapter.	A chapter can decide to create districts, defined by zip codes. If these are ever changed, immediately inform ANFP Chapter Relations .
IRS Forms	Every chapter is incorporated and has a federal tax identification number (FEIN). This is used for any IRS form (W-9, 990, etc.). <i>*Chapters may not use national ANFP Tax ID.</i>	Districts do not complete IRS Form 990 (for tax exemption). For W-9s and other forms requiring a tax ID number, districts should use the state chapter's ID.
Rebates	Chapters are eligible to receive rebates biannual, based on state membership count on 5/31 and the receipt of required documents (such as bylaws and policies and procedures, etc.)	Districts do not receive rebates from ANFP, but depending on the chapter's policies and procedures, districts may receive their own rebate from the state.
Bank Accounts	Chapters are to manage all finances for chapter and district business.	Districts should not have separate bank accounts from the state chapter.
Meetings	Based on minimum standards of an active chapter, there must be at least one educational meeting per year.	Districts should host no more than one educational meeting per year and ensure it does not conflict with the chapter meeting.
Dues	Chapters do not charge dues. This is included in the annual fee paid to HQ. Chapters are eligible for biannual rebates (see above).	Districts do not charge dues. Chapters may choose to disburse funds to districts, depending on their own policies.

Below is a list active ANFP chapters (listed alphabetically):

Alabama	Iowa	New Hampshire	Southern New England
Alaska	Kansas	New Jersey	(includes CT, MA, RI)
Arizona	Kentucky	New Mexico	Tennessee
Arkansas	Louisiana	New York	Texas
California	Maine	Nevada	Utah
Colorado	Maryland, Delaware &	North Carolina	Vermont
Florida	DC	North Dakota	Virginia
Georgia	Michigan	Ohio	Washington
Guam	Minnesota	Oklahoma	West Virginia
Hawaii	Mississippi	Oregon	Wisconsin
Idaho	Missouri	Pennsylvania	Wyoming
Illinois	Montana	South Carolina	
Indiana	Nebraska	South Dakota	

CHAPTER MINIMUM STANDARDS

A chapter is considered active if it completes the following tasks each year:

- Complete each submission (2 parts) of the Bi-annual Chapter report throughout the volunteer year, with final submission in by January 15
- Submit officer and committee volunteer names in the chapter portal for the upcoming volunteer year to ANFP headquarters by June 1; ensure that chapter officers are members in good standing of ANFP (Officers must be entered each year, regardless of the length of their term or if they will change mid-year.)
- Complete 990 IRS filing annually (for tax exemption)
- Hold a Chapter educational meeting, utilizing the ANFP Approved Speaker Directory. (This is a speaker directory from the Professional Development Committee identifying topics and speaker suggestions.) Dates and contact information for the meeting must be submitted through the chapter portal
- Maintain communication between the Chapter and the membership (i.e., meeting announcements, newsletters, etc.), and send all Chapter member correspondence to ANFP Headquarters
- Encourage attendance by at least one Chapter leader (preferably president-elect) at the Annual Conference
- Hold regularly scheduled board of director's meetings in accordance with Chapter bylaws.
- Submit Chapter bylaws and policy and procedures to ANFP Headquarters after reviewing with state board annually; and
- Hold board of director's election each year, or as directed by Chapter bylaws, by mail or electronic ballot ensuring that each member has one vote or applying the slate process;

If a chapter has completed these activities and met the other rebate requirements (see Rebate Requirements section) and the terms within the affiliate agreement, they are entitled to a rebate of membership dues to support the goal of providing consistent, quality member experience at chapter level through education and communication. The association shall issue a rebate to the chapter in the amount the Board of directors shall approve. This rebate will determine by the state's membership numbers at the end of the association's fiscal year (May 31).

Chapter rebates are issued via direct deposit two times a year. Bank account and routing information must be provided to ANFP headquarters using the official ACH agreement form. It is the responsibility of the chapter officers, to provide an updated form to ANFP headquarters should any information change. Forms may be requested at finance@ANFPonline.org.

REBATE REQUIREMENTS

In addition to chapter minimum standards, the information below is required for the bi-annual rebate distribution throughout the volunteer year. Please see the full checklist on ANFP*Connect* under Chapter Management.

Chapter Rebate Requirements & Standards	Due Date	Submit Via	Date Completed
PART I - Rebate Distributions Begin for Eligible Chapters			
Submit bank statement for the month of April to ANFP Headquarters	MAY 31	Chapter Portal	
Officers Entered in Chapter Portal for future volunteer year (June 1 - May 31) (Officers must be entered each year regardless of length of term.)	JUNE 1		
Code of Conduct - Signed by Chapter President, President- Elect, Treasurer, Secretary			
Affiliate Agreement – Reviewed, signed and submitted to National	JUNE 15		
Submit end of the year financial statement by June 30 each year (for the previous fiscal year) to ANFP Headquarters	JUNE 30		
Submitted to National: <ul style="list-style-type: none">• Fall Meeting Dates• 990 filed and E-receipt submitted (June 1 - May 31)• Bi-Annual Chapter Rebate Achievement Report - Part 1	JULY 15		
PART 2 - Rebate Distributions Begin for Eligible Chapters			
Submit bank statements for the month of October to ANFP Headquarters	NOV 30	Chapter Portal	
Submitted to National: <ul style="list-style-type: none">• Chapter Bylaws• Policies & Procedures• Bi-Annual Chapter Rebate Achievement Report - Part 2	JAN 15		
Ongoing			
<ul style="list-style-type: none">• Maintain communication between the Chapter and the membership (i.e., meeting announcements, newsletters, etc.), and send all Chapter member correspondence to ANFP Headquarters• Encourage attendance by at least one Chapter leader (preferably president-elect) at the Annual Conference• Hold regularly scheduled board of directors meetings in accordance with Chapter bylaws.			
OPTIONAL AWARDS: <ul style="list-style-type: none">• State Achievement Award Qualifying chapters must have score of 85% or higher on the following chapter awards: Membership, Government affairs, Communications. Earn an additional 10 points by submitting one nomination for ACE Awards. (Chapter to designate points to the award of their choice.) (Separate membership, government affairs and communications awards will continue to be given based on the scoring system.) <ul style="list-style-type: none">• Communications• Government Affairs• Membership• Diamond	MARCH 31	Chapter Portal	

Other Chapter Annual Best Practices: These are NOT required but should be part of your chapter's annual best practices prior to the start of each volunteer year.

- Regular board of directors and finance committee meetings according to your chapter's bylaws
- Review/revise annual goals
- Create annual budget
- Review/revise chapter strategic plan, bylaws, and policies & procedures
- Distribute member satisfaction survey
- Develop succession plan/outline
- Create (and utilize) Finance Committee
- Distribute call for volunteers

REBATE STRUCTURE

Chapter rebates are distributed two times per year. Rebate distribution is based on 5/31 state membership numbers (from the fiscal year prior) and meeting chapter minimum standards and requirements. Membership numbers include; professionals, allied, certified and retired members. Funds should be used to benefit ANFP members.

NUMBER OF MEMBERS	NEW AMOUNT* (ANNUALLY)
0 - 74	\$1,100
75-149	\$1,500
150 - 225	\$2,000
226 - 299	\$2,200
300 - 399	\$2,800
400-499	\$3,000
500-799	\$3,500
800-1091	\$4,600

*Range does not include payment for bonding and liability insurance (\$135 annually) which will be deducted from the first part of rebate distributed in June.

Adversity Rebate

For those chapters that need additional financial assistance, they can apply for the adversity rebate. The adversity rebate is to help off-set ANFP chapter operational costs related to meetings, programs, or other initiatives in times of need or hardship. It is not meant to supplement a budget or to support, scholarships, grants, travel to ANFP meetings or personal expenses. Additionally, chapters that have been affected by natural disasters that need assistance for expenses incurred by the disaster (i.e. meeting cancellation fees) may apply as well. For the full set of rules and guidelines for the adversity rebate, as well as the application please go [HERE](#).

To qualify for the adversity rebate, a chapter must meet the following requirements.

- The chapter must have met all rebate requirements for the current ANFP fiscal/volunteer year. (Please see rebate requirement checklist/volunteer handbook. Chapter Relations staff will verify.
- Must have active tax exempt status with IRS.
- Funds may not support travel to ANFP meetings, personal expenses or any other projects that benefit an individual member or another organization.
- Chapter must have accurate financial account information on file with ANFP National. (If not, please e-mail finance@ANFPonline.org for an ACH form.)
- Funds must support a one-time expense. They are not meant to sustain a program (like scholarships or grants).
- The chapter must submit a proposed budget of the project/program/initiative with the application.
- Additional funds received as an adversity rebate, must be spent within 30 days of disbursement.
- A follow-up report along with receipts, must be completed after the project end date, and returned to ANFP within 30 days. ANFP will provide the report form.

APPLICATION AND PAYMENT TIMELINE

Applications for the adversity rebate are accepted throughout the year. However, if you require the additional funds by a certain date, please refer to the application and payment timeline below.

Application and Payment Timeline

APPLICATION DEADLINE	6/1	9/1	12/1	3/1
PAYMENT DISBURSED	6/30	9/30	12/30	3/30
EXPENDITURE COMPLETED	7/31	10/31	1/31	4/30

Misuse of Funds

Should mismanagement be reported/suspected, rebates by ANFP National, and all other funding will be suspended while an investigation is conducted. Upon resolution and a determination that either no mismanagement has occurred, or an agreement by the chapter to take the necessary steps to make good on any mismanagement uncovered during an investigation, funding will resume. All funds and payments will be withheld during an investigation and will not be recuperated following the end of the investigation. Misuse of funds awarded for the adversity rebate will disqualify the chapter from future eligibility of adversity funds, unless otherwise approved by the Chapter Leadership Team.

Affiliate Agreement

In addition to the above standards, all active chapters must review and submit a signed copy of the affiliate agreement to National each year (available for download in the Chapter Portal or request a copy via chapters@ANFPonline.org.) It is a best practice of associations with affiliates, explaining the responsibilities of headquarters staff and those of affiliates of the parent organization. It intends to protect both the national organization and chapter affiliate by establishing separate identities.

ANFP Headquarters Support to Chapters:

- Promotion of Chapter membership and benefits.
- Remittance of chapter rebate.
- Promotion of Chapter events on website.
- Covered by ANFP's bonding and liability insurance policy
- Support in identifying educational topics and speaker resources through the Speaker Directory.
- Chapter website hosted and managed by ANFP Headquarters.
- Annual Chapter Training for Chapter representatives to be held in conjunction with the Annual Conference. Chapter representatives attend at Chapter's or attendee's expense, as determined by Chapter Board of Directors.
- Chapter awards presented to a Chapter submitting State Achievement Award and additional optional awards.
- Chapter Leadership Team conducts visits and chapter board training.
- Volunteer Leader, electronic newsletter with Chapter information sent monthly to all volunteers.
- Volunteer Resources Online is continually updated under the member community, *ANFPConnect*.

CHAPTER BYLAWS AND POLICIES & PROCEDURES

BYLAWS	POLICIES & PROCEDURES
Operating rules of the organization. Review with chapter board of directors annually.	“How to” document for day-to-day tasks. Review with chapter board of directors annually.
A membership vote is required to change this document.	A board vote is required to change this document.
Each chapter and the national organization all have separate bylaws.	Policies and procedures are unique to a chapter. The national organization also has a separate document.
All state board members should be familiar with chapter bylaws.	Detailed guidelines should answer controversial questions concerning the “proper” way to do things.
Send updated copies to chapters@ANFPonline.org . ANFP Chapter Relations recommendations can be found on templates on the member community, ANFPConnect, under Volunteer Resources.	

Chapter Bylaws

Chapter bylaws and policies and procedures should be reviewed by the chapter board annually and dated the with current year regardless of edits/changes.

Changes or amendments to chapter bylaws require membership approval. All members should receive a written copy of the existing language or bylaw along with the proposed language or bylaw change. Once members have received the proposed changes, allow 10 days for members to review. If the changes or amendments are met with no objections (or less than 2/3 of the chapter’s membership) the bylaws are considered approved and should be finalized by the board of directors.

Dissolution

If a chapter chooses to dissolve, the following guidelines apply:

By two-thirds (2/3) action of the Executive Committee, the State Association may be dissolved. In the event of such dissolution, the Executive Committee, after paying or making provision for the payment of all the liabilities of the State Association, shall dispose of all its assets to ANFP as an exempt organization under Section 501 (c)(6) of the Internal Revenue Code of 1985 (or the corresponding provision of any United States Internal Revenue Law as determined by the Executive Committee), along with a final bank statement and other financial documents.

No part of the net earnings of the State Association shall insure to the benefit of or be distributable to its members, officers, directors or other private persons, except that the State Association shall be authorized and empowered to make payments in furtherance of the purposes set forth in these bylaws. The State Association shall at no time take part in any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of those bylaws, the State Association shall engage in no activities which would preclude it from continuing to qualify as an exempt organization under Section 501(c)(6) of the Internal Revenue Code.

If the chapter wishes to dissolve, the chapter will need to complete the Request to Dissolve form to be submitted to National indicating the reason they wish to disband, if they wish to join a surrounding chapter with an existing name or join a surrounding chapter and form a new DBA.

If a newly formed chapter is desired amongst several surrounding/consolidated chapters, check with the appropriate state to ensure there is not a requirement to file documents with the Secretary of State of the renaming organization.

TERMINATION OF CHAPTER

ANFP may terminate and withdraw the State Association's affiliation upon the occurrence of any of the following events:

- Failure of the State Association to comply with ANFP's Bylaws, the Association Affiliate Agreement, and/or promulgated policies and procedures.
- Upon an affirmative vote by two-thirds (2/3) of the ANFP Board of Directors.

Upon termination, Affiliate shall cease using the ANFP name, trademark, trade name and logo, and all other rights and privileges associated with being affiliated with ANFP and shall return any and all funds and property belonging to ANFP. Chapters financial obligations to ANFP incurred before termination shall remain an obligation of Chapter until paid or otherwise resolved.

The balance of remaining chapter funds is to be returned to ANFP headquarters and will be applied to the active chapter program/services.

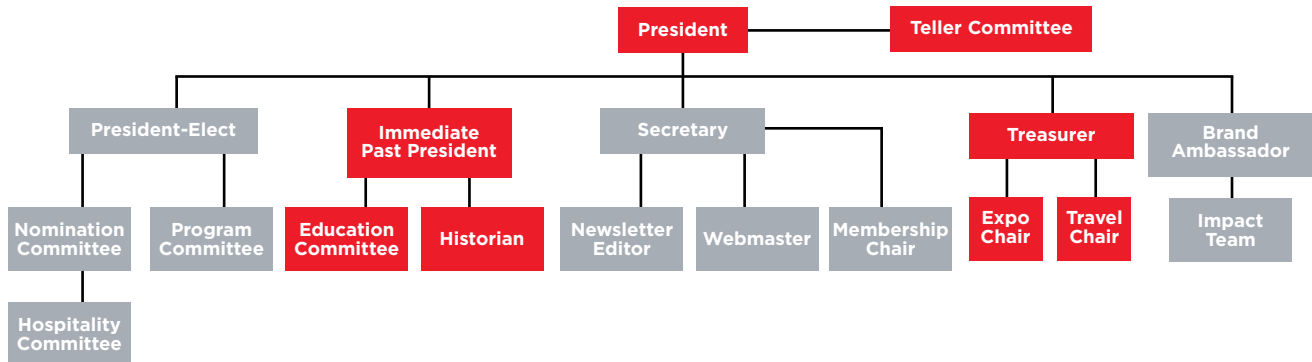
SECTION IV

CHAPTER LEADERSHIP ROLES

CHAPTER LEADERSHIP ROLES

Sample Organizational Chart

An organizational structure helps delegate and determine responsibility as well as encourage teamwork with clear expectations.



Officer Installation Ceremony

Most chapters and districts install new officers at fall meetings. The ceremony script can be found [HERE](#).

Executive Committee

The executive committee of the Board of directors includes the president, president-elect, secretary, treasurer, treasurer-elect and immediate past president. The executive committee shall exercise powers of the Board of directors, to the extent permitted by law, between meetings of the Board of directors. The executive committee shall meet at such intervals as deemed necessary by the President. All qualified candidates serving in any role on the Board of directors shall be responsible for interpreting chapter bylaws, making policy decisions, executing the policies and procedures to ensure chapter goals are met and serving as liaisons as appropriate to staff and committees.

Each Officer is Expected to:

- Attend all board of directors and executive committee meetings.
- Prepare for meetings by submitting issues for the agenda, submitting reports for Board review, and thoroughly reviewing all agenda materials provided
- Participate in board meetings through active discussion of issues, review of reports, and involvement in decision-making and supplying pertinent input
- Approve budget, create and monitor policy, provide oversight
- Maintain confidentiality of all information discussed and presented at board of directors and executive committee meetings
- Represent the viewpoint of membership and act in the chapter's best interest in Board decisions
- Serve as an ambassador to the chapter by attending chapter meetings to include, but not limited, to regional and annual meetings if possible
- Establish lines of communication with members and staff, actively soliciting information and input to support adequate data for decision-making
- Function as a liaison to committees as assigned
- Has the authority to certify the bylaws, resolutions of the members and board of directors and committees thereof, and other documents of the corporation as true and correct copies thereof

CHAPTER LEADERSHIP ROLES

President

The principal elected officer of the governing body of the chapter serves is responsible for the overall direction of chapter through policy decisions as well as the following:

- Leads Board meetings through active discussion of issues, review of reports, participation in decision-making and supplying pertinent input
- Works with the Executive Committee in recruiting members of the Board and other talent for whatever volunteer assignments are needed
- Procures the best thinking and involvement of each Board member, stimulating each one to give his/her best
- Presents to the board of directors an evaluation of the pace, direction, and organizational strength of the chapter
- Annually focus the attention of the Board of directors on matters of organizational governance which relate to its own structure, role, and relationship to the management of the Chapter. The president must be assured that the Board of directors is satisfied that it has fulfilled its responsibilities.
- Serves as an alternate spokesperson for the chapter
- Fulfills such other assignments as the Board of directors agree are appropriate and desirable for the President to perform
- Represents the chapter
- Serves as 'host' at the meetings
- Conducts orientation for new board members and trains president-elect to competently take over after your tenure

The President Should Also:

- Have a working knowledge of officer and committee roles and be willing to help other volunteers understand their duties
- Create agenda for board and business meetings
- Oversee committee activities
- Communicate with membership through chapter newsletters
- Forward all official chapter communication to [ANFP Chapter Relations](#)
- Submit required chapter forms to ANFP Chapter Relations (see chapter minimum standards)
- Delegate required chapter forms
- Understand and communicate expectations of affiliate agreement to board
- Understand and use parliamentary procedures and Roberts Rules of Order
- Understand, support and promote the association's Code of Ethics
- Understand and support the association's mission, goals, bylaws, and operating procedures

Minimum hours per month: 12-16 (per week 3-4). Actual time required varies from chapter to chapter.

President-Elect

The President-elect assumes the responsibilities of the president in his or her absence. Assists the president in carrying out the function of that office and performs specific duties delegated by the president as well as the following:

- Maintains regular contact with chair to receive status updates on the chapter
- Learn president's responsibilities; ask questions, review resources, and make plans
- Oversee activities of district (if applicable) program committee, and teller's committee.
- Report updates to executive board and newsletter editor
- Attend all board and business meetings
- Serve as a member of chapter's executive and finance committee (if applicable)
- Appoint committee chairs and members the spring before your year as president. Send a written invitation to candidates to explain purpose and responsibilities. All appointments should be confirmed in writing. (Refer to chapter bylaws for active committees.)
- Write tasks of each committee and explain these to volunteers. These can include goals, budget, objectives, etc.
- Create a plan to implement plans immediately upon installation

CHAPTER LEADERSHIP ROLES

The President-Elect Should Also:

- Actively recruit volunteers during term. Succession planning is essential to continue an active chapter
- Accepts responsibilities delegated by the President, such as representing the President at allied organization meetings, and any other duties as appropriate to the chair
- Make every effort to audit national board of directors meeting at ANFP's Annual Conference to learn as much as possible about organizational goals, objectives, policies, and procedures
- Understand and use parliamentary procedures and Roberts Rules of Order
- Understand, support and promote the association's Code of Ethics
- Understand and support the association's mission, goals, bylaws, and operating procedures

Minimum hours per month: 10-12 (per week 2-3). Actual time required varies from chapter to chapter.

Immediate Past President

The immediate past president provides counsel to the board of directors as well as the following:

- Stay in frequent contact with the president to offer support and counsel
- Plays a leadership role on the board by encouraging cooperation and teamwork. Ideally, should serve as a consensus-builder. Uses experience as previous chair of the Board to help to move Board deliberations along constructive, productive lines
- Serves as parliamentarian and oversight of annual policy and procedure revisions
- Serves as presiding officer during installation ceremony at the chapter's annual meeting
- Is a member of the executive committee

The Immediate Past President Should Also:

- Carry out activities as assigned by president
- Oversee activities of education committee and historian
- Attend all board and business meetings
- Mentor president and other volunteers when needed
- Reference chapter bylaws and policies and procedures for additional duties

Minimum hours per month: 4. Actual time required varies from chapter to chapter.

Secretary

The secretary is responsible for official chapter business and related activities as well as the following:

- Write and send all notices of board and business meetings. Each invitee must be notified at least 10 days prior to a planned meeting.
- Bring a copy of previous meeting minutes for the year to board and business meetings
- Take and prepare meeting minutes. Send a copy to all board members and ANFP Chapter Relations within three weeks following the meeting.
- Oversee activities of newsletter editor and membership committee. If chapter does not have a membership committee, the secretary should contact new, potential, and dropped members to encourage them to join or renew.
- Invite students to state and district meetings and explain the benefits of ANFP membership and being a CDM
- Distribute active and inactive membership lists to district and other officers upon request. These should not be shared with allied associations, corporate sponsors, or workshop presenters
- Once the nominating chair submits names and addresses of selected officers, the secretary prepares the slate or ballot for distribution to the membership

CHAPTER LEADERSHIP ROLES

The Secretary Should Also:

- Make every effort to audit national board of directors meeting at ANFP's Annual Conference to learn as much as possible about organizational goals, objectives, policies, and procedures
- Update chapter policies and procedures when needed. Forward document to ANFP Chapter Relations.
- Assist president-elect in staying updated on district activities (if applicable)
- Understand and support the association's mission, goals, bylaws, and operating procedures
- Familiar with parliamentary procedures and Roberts Rules of Order
- Understand, support and promote the association's Code of Ethics

Minimum hours per month: 8-10 (per week 2). Actual time required varies from chapter to chapter.

Treasurer

The treasurer is responsible for the financial affairs of the chapter as well as the following:

- Oversight of the budgeting process
- Review association financial reports on a regular basis to ensure overall fiscal integrity
- Maintain financial records for chapters and districts including checking and savings accounts
- Report financial condition of chapter to board and membership
- Complete IRS Form 990EZ or Epostcard to stay tax-exempt
- Chairs the Finance Committee (if applicable) and Executive Committee
- Obtain the proper permits/licenses for charitable gaming (raffles, bingo, casino games, etc.) if required in state.

The Treasurer Should Also:

- Develop use for excess funds to benefit ANFP members
- Oversee activities of travel committee (if applicable)
- Ensure districts have separate bonding coverage if they have separate bank accounts.
- Know state policies and procedures for: bonding, signing checks with more than one signature, authorizing bills prior to payment, reimbursing officers, and committee members, handling accounts for chapter meetings, depositing excess funds into interest-bearing accounts, reporting to executive committee, reporting to membership, having all accounts audited before passing books to incoming treasurer.
- Understand and support the association's mission, goals, bylaws, and operating procedures
- Familiar with parliamentary procedures and Roberts Rules of Order
- Understand, support and promote the association's Code of Ethics

Minimum hours per month: 10-14 (per week 2-3). Actual time required varies from chapter to chapter.

Treasurer-Elect

The treasurer-elect assumes the responsibilities of the treasurer in his or her absence. Assists the treasurer in carrying out the function of that office and performs specific duties delegated by the Treasurer as well as the following:

- Familiarizes themselves with finance practices for official chapter business
- Trains to learn the budgeting process
- Assists with the annual budget process; working in collaboration with the treasurer, president & CEO and ANFP staff
- Serves as a member to the Finance (if applicable) and Executive committees
- Assists with annual audit as necessary

The Treasurer-Elect should also:

- Understand and support the association's mission, goals, bylaws, and operating procedures
- Familiar with parliamentary procedures and Roberts Rules of Order
- Understand, support and promote the association's Code of Ethics

Minimum hours per month: 10-12 (per week 1-2). Actual time required varies from chapter to chapter.

OTHER VOLUNTEER LEADER ROLES

Education/Program Chair

- Maintain information on local educational programs, workshops, and seminars that are approved for continuing education hour credit
- Promote educational opportunities to state membership
- Submit CBDM prior approval form for educational sessions (found on the member community, ANFP*Connect*, under Volunteer Resources) at least 8 weeks in advance
- Keep executive board updated on workshop timelines and any help you may need
- Plan chapter meetings by securing speakers, negotiating facility contracts, and budgeting. This should start at least six months in advance
- Keep documentation and notes on process to pass on to incoming volunteer
- Determine budget with president-elect
- Survey state membership about what type of meeting they prefer and when (weekend, one-day, etc.); review previous meeting attendance
- Write a policy about program costs (complimentary registrations, free meal tickets, etc.)
- Create use for meeting profits to the benefit of members
- Additional considerations: setting a timetable, finances, site selection, meeting topics, speakers and corporate sponsors, promotion, registration

Minimum hours per month: 4-12 (per week 1-3). More hours are required in the 6 months before meeting. Fewer hours needed in months immediately following a meeting, but work on the next meeting should start immediately. Actual time required varies from chapter to chapter.

Membership Chair

- Oversee membership committee (if applicable)
- Be familiar with ANFP member types and eligibility qualifications at www.ANFPonline.org
- Request brochures and other materials from ANFP Chapter Relations when planning a presentation at a school, job fair, allied association convention, etc.
- Report activities to secretary
- Contact new, potential, and dropped members throughout the year with secretary's help
- Evaluate current membership retention and recruitment strategy and determine ways to reach more members. (Reports for new or inactive members are available via the chapter portal.)
- Submit the Membership Award if your chapter decides to do so.

Newsletter Editor

- Create a professional publication to be distributed to chapter membership
- Ensure items are cited, timely, relevant, and attractively presented
- Request chapter logos from ANFP Chapter Relations. Each chapter has a unique logo; the national ANFP logo is reserved for communications sent from headquarters.
- Request mailing labels (\$0.50 per member) by e-mailing chapters@ANFPonline.org or download (for free) the membership roster (with e-mail addresses) off of the from the chapter portal, under the member login at www.ANFPonline.org to ensure the most updated contact information
- Budget for the production and postal (if relevant) of the newsletter
- Determine how many times per year the newsletter will be designed and distributed
- Proofread all newsletters prior to distribution
- Submit the Communications Award if your chapter decides to do so.

Minimum hours per month: 8-10 (if producing 4 issues). Actual time required varies from chapter to chapter.

OTHER VOLUNTEER LEADER ROLES

Nominating Chair

- Work with other nominating committee members, select candidates for the slate or ballot to become chapter leaders
- Collaborate with nominating committee to prepare and distribute a slate or ballot (president-elect does not get vote)
- Ensure deadlines for the nominations and slate or ballot are met

Minimum hours per month: 0-5. No hours required in months following election. Actual time required varies from chapter to chapter.

Vendor/Expo Chair

- Oversee chapter's expo; including collecting fees and payment, space assignment, logistics, marketing, etc.
- Work with vendor/expo committee members to solicit booths and sponsorships
- Coordinate booth displays at industry related meetings and/or trade shows
- Develop and oversee vendor-to-partner/partnership programs
- Ensure vendors receive recognition in program materials, websites, or other forms of marketing

Minimum hours per month: 0-5. No hours required in months following election. Actual time required varies from chapter to chapter.

Brand Ambassador

- Act as an ambassador of the chapter and promote CDM, CFPPs and ANFP through public awareness activities
- Develop relationships with key stakeholders, colleges & universities, state health departments, community leaders, legislators, regulatory agencies, and the public
- Recruit and train members to act as advisors for new members
- Advocate for education promotion and pathways within the state
- Exhibit at trade shows of allied associations, healthcare shows/conferences or other industry related events
- Understand National government affairs campaigns/efforts and act as key point of contact for chapter members with questions
- Implement efforts to impact state initiatives, such as writing letters, calling lawmakers, regulators, and allied associations (i.e., Pride in Foodservice Week, Governors Proclamation, etc.)
- Meet with allied associations to create alliances and build recognition of ANFP
- Update board and membership regularly via meetings, newsletter articles, and e-mail
- Submit the Government Affairs Award if your chapter decides to do so. The application can be found at in the chapter portal. (You must be logged in to the member portal to access the chapter portal.)

Minimum hours per month: 12-16 (per week 3-4). Actual time required varies from chapter to chapter.

OTHER VOLUNTEER LEADER ROLES

Ways and Means Chair (Sample from Iowa ANFP)

- Responsible for selling raffle tickets and any other approved merchandise to chapter members
- The raffle monies will go to the travel fund. Monies from sales of approved merchandise go into the general fund. NOTE: Raffle sales may require a state Gambling License. Check with your state government.
- The committee chairperson shall submit an article to the Newsletter Editor for publication in the Spring and Fall newsletters which will include information about fundraising projects.
- Shall search for items of interest to ANFP members for the raffle sale or other fundraising projects for the general and/or travel fund.
- Shall attend the Executive Committee meetings and present a report making suggestions for fundraising projects.

Webmaster

- Evaluate chapter website to determine timeliness and relevance of information
- Communicate regularly with executive board to be familiar with chapter and industry news and events
- ANFP hosts all chapter websites; find your chapter's site [HERE](#).
- Submit update requests to ANFP Chapter Relations at chapters@ANFPOnline.org; requests may take up to 10 business days to complete
- Submit up to 30 photos per chapter event to be posted
- Assist newsletter editor with completing the Communications Award (optional)
- Submit the Communications Award if your chapter decides to do so. The application can be found via the chapter portal.

Minimum hours per month: 4. Actual time required varies from chapter to chapter.

Micro-Volunteering

Micro-volunteering opportunities focus on one-time, sporadic tasks that are quick and easy commitments but support the chapter. It is also a first step for members to become involved as volunteers. Micro-volunteering jobs include:

- Newsletter contributor
- Help with registration at chapter meeting
- Assisting with member recruitment/brand ambassador efforts
- Solicitation of vendors
- Social media posting submissions
- Reaching out to new members
- Assisting with prior approval applications
- Introducing speakers at meetings

Other Short Term Roles

Each chapter has a unique structure and may have different positions than listed in this handbook. Depending on your chapter's needs, there may or may not be a need for the above roles. All volunteer positions should be outlined in your chapter's policy and procedure manual.

SECTION V

COMMITTEES

COMMITTEES

Standing & Ad-Hoc Committees

Membership of each of the standing and ad-hoc committees shall be determined by the President-elect for service during his or her term of office as President.

Finance Committee

The board of directors is responsible for implementation and for maintaining a sound financial condition and protecting the chapter's financial interest. The finance committee is responsible for overseeing the financial, and investment activities of the chapter. The finance committee is delegated the responsibility of developing and administering said policy through written procedures in accordance with the Board's overall direction. The committee shall interface with the outside independent accountants and investment advisors (if deemed necessary) and be responsible to the Board of directors in its oversight of such activities. The finance committee shall include the two board members and two non-board members, at a minimum. The president-elect shall determine membership of this committee.

Education/Program Committee

The Education or Program Committee exists to develop and manage the organization of the educational content and opportunities provided at/or in conjunction with ANFP state chapter meetings. Responsibilities include

- Procure and vet all speakers, venue(s)/hotel rooms, audiovisual partners, and other vendor services deemed as necessary.
- Reviewing and presenting call contracts to the Board of Directors for approval.
- Planning and executing all meeting logistics; registration, marketing, on-site management, AV and room set-up, food and beverage, etc.
- Ensure the education provided to members meets ANFP standards and is eligible for CE.
- Secure sponsorships for meeting.
- Secure exhibitors if a vendor chair is not in office.
- Notify ANFP national of meeting dates and locations and registration instructions.
- Complete and submit CE Prior Approval applications and required forms to provide CE credit.
- Ensure a post-meeting evaluation form is distributed to attendees.
- Act as point of contact for all other related educational opportunities within the state and inform members of opportunities in a timely manor.

Membership Committee

The membership Committee exists to recruit new members and ensure active members renew their memberships. Responsibilities include:

- Contact prospective members by phone or e-mail to invite them to join
- Contact all new active members personally by phone or e-mail to welcome them and invite them to the next meeting and extend the chapter's resources.
- Greet and introduce new members and prospective members at chapter meetings.
- Respond to disgruntled members' calls and solicit feedback for improvement.
- Contact delinquent members prior to cancellation and encourage them to renew.
- Host membership open house/meeting for prospective members.
- Visit and present to targeted groups or facilities
- Staff membership booths at trade shows and meetings.
- Host and lead new member receptions / orientations at annual and/or chapter Meetings. Serve as greeters and facilitators at new member orientations.
- Plan and implement an annual member-get-a-member campaign or other campaign.
- Develop/revise annual membership recruitment and retention plan
- Establish and implement goals of membership recruitment and retention plan.
- Develop and review satisfaction surveys. Determine and implement new ways to increase member satisfaction and determine and respond to members' needs
- Contact lapsed members to evaluate and respond to needs not being met by the Chapter.
- Identify new member benefits and services that are needed based on member feedback collected, as well as enhancements to existing member benefits.

COMMITTEES

Nominating Committee

The nominating committee exists to ensuring the long-term success of the association through a continuous succession of volunteer leaders.

Responsibilities include:

- Ongoing and continuous focus on identifying, recruiting, and equipping future board and committee leaders, including the definition of skills and attributes required in volunteers, within and beyond the membership
- Providing input and content for board orientation, training, assessment/evaluation tools and succession planning
- Formulating the slate or ballot for the election of officers and contacting candidates

The committee reports directly to the Board of directors. The chair of the committee, Immediate Past Chair of the Board of directors, shall lead the committee's deliberations and actions and will not have a vote. The President of the Board of directors shall serve *ex officio*.

Committee members include:

- Immediate Past President
- President-Elect,
- ANFP Chair-Appointed, one or two Past Presidents

Committee members will be expected to participate in this year-round commitment, meeting regularly throughout the year.

Vendor/Expo Committee

The committee should obtain vendor leads, distribute, and collect signed contracts, assign booth space/booths, expo promotion, collect payment and work with vendors on show logistics.

- Responsible for the coordination and execution of booths at other industry affiliated agreements where chapters can purchase or acquire a booth.
- Responsible for submitting a board report as requested by the Board of Directors.
- Committee should consist of the Vendor Chair along with two to three additional members.

Tellers Committee

The tellers committee is responsible for counting and tallying elections votes following the board election as well as the following:

- Count returned ballots. Committee should be three ANFP members, appointed by president-elect.
- Designated chairperson will schedule a meeting with other committee members, prior to closing of polls, to prepare the process for counting ballots.
- No member of nominating committee will be appointed to teller's committee.
- If ballots are mailed to members, all ballots shall be returned to the chairperson of the teller's committee. The name and address of that person should appear directly on the ballot. If voting is to take place at a chapter meeting, ballots should be placed in a secure ballot box until the teller's committee can take them to a private location to count.
- The chairperson will receive and maintain the unopened ballots until the polls are closed.

COMMITTEES

- Only eligible ANFP members can vote in an ANFP election. The committee will disregard any invalid, improperly marked, or duplicated copies of the ballot.
- After the ballots have been counted and results have been immediately reported to the president (verbally, followed by written confirmation), ballots and any other election materials are retained by the chapter secretary, until the completion of the election for the following year. Ballots should be destroyed at this time.
- The chair's written report of election results is confidential since it reflects the names of candidates and the number of votes cast for each. This will be filed with the secretary.

The president should only reveal the names of the elected chapter leaders. The number of votes received by each candidate should NOT be announced.

Counting Ballots

- It is important the total number of ballots be counted. This number must not exceed the total number of voters and ballots issued.
- One teller should read the ballots and call the vote while the other two tellers tally the votes on a tally sheet. Ballots should be counted a second time with the tellers reversing roles. The results must be consistent.

Validity of Vote

- Some part of the voter's mark must appear inside the box. If no preference is marked for a particular office, a vote cannot be counted.
- Only the votes that are marked can be counted.
- A ballot cast without any markings at all will not be counted. If a candidate is written in, the name must appear under the office title.
- A written in name must also have a mark next to it indicating a vote cast.
- Ballots must be cast prior to, or on, the deadline date. (Can use postmark to confirm.)
- If tellers cannot determine the intent of the voter, the vote shall be considered invalid.

Minimum hours per month: 2-3 during an election. Actual time required varies from chapter to chapter.

Hospitality Committee

The Hospitality Committee is responsible for developing, planning, and implementing activities or events to build morale and encourage camaraderie among chapter members. Additionally, the committee should develop a program or activities for welcoming new or potential members.

DISTRICTS

Chapter & District Financial Account Management

District Financial Accounts

Districts should not hold separate financial accounts or be conducting financial business separate from the chapter. If districts currently hold separate financial accounts, all funds should be transferred to the chapter's main financial account once outstanding invoices/payments have been reconciled. District accounts should be closed following payment reconciliation and funds have been transferred.

District Financial Transactions

All financial transactions for districts should be approved by the chapter board of directors and funds should be distributed by the chapter treasurer, once approved. For districts to receive funds in a timely manner, districts should prepare an annual budget and timeline for payments, and submit to the chapter board prior to the start of each fiscal year. Additionally, all payments for chapter or district business should be paid for with a check whenever possible. If using a bank credit/debit card, always select 'Credit' when given the option.

Chapters should consider using a national bank that will allow accounts to be transferred more easily when new officers (president and treasurer) take office.

IRS Filing

All district activities should be reported to as part of the chapter's 990 e-postcard filing each year. District leaders should be providing a quarterly report to the chapter board for this purpose.

District/Education Meetings

Districts should host no more than one educational meeting per year and ensure it does not conflict with the chapter meeting. To provide CE hours at district meetings, districts will need to complete the CE Prior Approval Application (for Chapters) and submit to priorapprovals@ANFPonline.org, along with all required documents at least 8 weeks prior to the meeting.

Should district members wish to meet at other times throughout the year, they should consider social and networking events that are not associated with CE opportunities.

For alternative CE opportunities, consider local or national vendors that offer CE opportunities within their local offices/facilities.

SECTION VI

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**RESOURCES FOR
CHAPTER LEADERS**

RESOURCES FOR CHAPTER LEADERS

ANFPConnect & Volunteer Resources

All volunteers have access to ANFPConnect as well as Volunteer Resources which is located in ANFPConnect. Members must log in to both the member portal as well as ANFPConnect to gain access to Volunteer Resources. Under Volunteer Resources, members can find sample templates, forms, How To's and other information and documents related to chapter management. Log in at www.ANFPOnline.org.

Chapter Portal

Once the member has logged into www.ANFPOnline.org, volunteers can access the chapter portal from the menu on the left-hand side of their screen. A chapter portal guide is available on ANFPConnect. To log on, you will need your e-mail address and password.

In the chapter portal, chapter leaders can:

- Update officers
- Obtain a of chapter members
- Submit awards and chapter reports
- Update state meeting details
- Pull inactive member, student, and new member lists

Online LMS Courses

There are various courses available to help chapter leaders better understand their roles as well as the basics of chapter management and meeting planning. The courses are available in the ANFP Marketplace and include the following courses:

- Chapter Board Orientation
- Chapter Members/Volunteer Recruitment & Retention
- Chapter Brand Ambassador - Roles & Responsibilities
- Chapter Leadership: Meeting Planning
- Chapter President – Roles & Responsibilities
- Chapter Treasurer – Roles & Responsibilities
- Chapter Secretary – Roles & Responsibilities
- Newsletter Editor – Roles & Responsibilities
- Chapter Finance & Budget Course
- Chapter Leadership: Volunteer 101

Continue checking ANFPtv for additional courses to be added throughout the year.

Chapter Marketing & Recruitment Toolkit

The purpose of this toolkit is to assist our chapter members with recruitment and marketing efforts at the local level. We understand the challenges of recruiting and retaining new members. As your partner, ANFP national has provided several marketing and recruitment documents, and tools specifically for this initiative. There are three categories within the toolkit, each designed with a specific purpose; Communications & Tools, CDM Promotion Materials and Additional Resources. Please visit ANFPConnect to access documents.

Prior Approvals Toolkit & Marketing Resources

The purpose of this toolkit is to assist our chapter leaders in developing the chapter's education programs and applying for prior approval on continuing education credits using CBDM guidelines. There are four categories within the toolkit, each designed with a specific purpose; Handbook, Application & Tips, Samples & Templates, Tools & Resources, and Additional Meeting Resources. Please visit ANFPConnect to access documents.

Brand Ambassador Toolkit

The purpose of this toolkit is to assist our chapter's brand ambassadors as they fulfill their duties during their term. There are four categories within the toolkit, each designed with a specific purpose; Tools & Resources, How To's, Templates, and Marketing Materials. Please visit ANFPConnect to access documents.

RESOURCES FOR CHAPTER LEADERS

Sponsorship Toolkit

The purpose of this toolkit is to support our chapters' efforts as they seek sponsorship opportunities within their state or local area. Within this toolkit you will find such resources as Chapter Sponsorship Best Practices, Top 10 list to assist with building relationships with sponsors, and a chapter resume template to present to all prospective and current sponsors. Please visit [ANFPConnect](#) to access documents.

One-on-One Chapter Leader Support

The Chapter Leadership Team (CLT) is available for one-on-one support for chapters. Chapter presidents can reach out to National to request assistance and will be assigned a CLT member to act as a mentor. Chapter presidents will have the opportunity to ask questions and voice their concerns to a designated member of the CLT. It also allows CLT members an opportunity to understand the current state of the chapter as well as offer guidance and support if needed.

Through the CLT mentor, it's a chance for you to be heard and allow us to offer support and guidance with any challenges a chapter may be facing, as well as answer any questions related to chapter management. It is an opportunity for open, peer-to-peer dialogue to take place and cultivate a positive and reciprocal relationship.

Chapter Best Practices

Chapter Best Practices sessions are conducted at least three times per year either virtually or in person (i.e., ACE, Regional Meetings). Topics vary from meeting-to-meeting. In addition to learning about chapter-related management and operational topics, chapter leaders are given the opportunity to network and share best practices with other chapter leaders from around the country. Chapter leaders typically present the topic and generally 1.00 CE can be earned from taking the course.

Volunteer Leader

Volunteer Leader is a monthly newsletter for ANFP chapter volunteers. Each month the newsletter includes information on chapter-related challenges, how to's, social media best practices and other ANFP information.

Chapter Leadership Team

This national committee exists to provide consistent mentoring, leadership training and guidance to chapters and volunteers. Visit requests for chapter trainings may be made through chapters@ANFPOnline.org.

For a list of current committee members, visit www.ANFPOnline.org.

ANFP Staff Contacts

We are here to serve you! Below are the staff members at ANFP Headquarters who can help you with any question you may have. The full staff listing can be found at www.ANFPOnline.org. For chapter-related questions, please contact:



Abigail Solazzo, CAE
Director of Chapters & Leadership
800.323.1908
Extension 123
asolazzo@ANFPOnline.org



Lisa Feltz
Executive Administrative Assistant
800.323.1908
Extension 138
chapters@ANFPOnline.org

SECTION VII

CHAPTER AWARDS

CHAPTER AWARDS

State Achievement Award

The Bi-Annual Rebate Achievement Report recognizes chapters who achieve success in a variety of activities, including administration, public relations, education, and membership. All levels of accomplishment are recognized annual at ANFP's Annual Conference & Expo (ACE). The submission process will be completely online.

For chapters to qualify for the State Achievement Award, they must achieve a score 85% or higher on each of the following chapter awards:

- Membership
- Government Affairs
- Communications

Optional Chapter Awards

The below awards are optional. However, if a chapter wishes to be eligible for the State Achievement Award, they must complete the awards applications for Communications, Membership, and Government Affairs.

Communications Award – Optional

Recognizes chapter newsletter editors and webmasters whose newsletters and websites are outstanding in content and layout.

Membership Award – Optional

Recognizes chapters whose membership numbers have increased based on the chapter's recruitment and retention efforts.

Government Affairs Award – Optional

Recognizes chapters whose efforts have been effective in gaining awareness of the organization by legislative representatives, regulatory officials, or allied associations.

Diamond Award – Optional

The Diamond award recognizes chapters going above and beyond with special initiatives that serve the chapter and the organization and facilitate the sharing of ideas among chapters, thus encouraging and supporting the activity of all chapters that help to uphold the credential and support the organization.

- To qualify, chapters must have met the following criteria:
- Met all rebate requirements for the past two rebate cycles (June and January of volunteer year)
- Chapter initiative falls into one of the 5 categories:
 - Recruitment & Retention
 - Meetings & Education
 - Social Media
 - Advocacy/Government Affairs
 - Community Service & Projects
- Include timeline of project
- Nominees must explain how and why their submission fits into the below categories and how the initiative impacted the chapter, membership and/or organization.

The award is based on impactful and innovative initiative outside the perimeters of other awards criteria and requirements and standards of an active chapter. In order to qualify for the award, initiatives should fall into the one of the following categories:

- **Recruitment & Retention** – Unique, sustainable member recruitment campaign and/or program, leadership succession plan and program, etc.

Example: Leadership workshops for volunteers, rewards or incentive programs for recruitment, etc.

- **Meetings & Education** – Unique programming/sessions/workshops at chapter meetings or alternate ways to earn CE.

Example: Series of webinars, virtual and interactive sessions, culinary competitions, sanitation knowledge/quiz bowls, TED talk style presentations

- **Social Media** – unique use of campaigns, increase of presence and/or followers, shares, engagement, etc.

Example: Challenges & contests (i.e. # of shares in one day, trending/viral challenges like ALS ice bucket challenge), Facebook live – (broadcast events, interview/introductions of board members, new members, staff etc.)

- **Advocacy/Government Affairs** – unique campaigns or initiatives that bring awareness to the credential at the state level or furthering the CDM, CFPP to be recognized by the state.

Example: Member e-mail campaign to administrators, lawmakers, and other relevant industry stakeholders, lunch with lawmakers, booths at healthcare or relevant foodservice industry meetings

- **Community Impact Service & Projects** – A project or service that positively impacts the community and helps to further the awareness of ANFP and the role of the CDM, CFPP within the community.

Example: Serving and/or collaborating with Meals on Wheels, serving or volunteering with local youth programs, Pride in Foodservice initiative throughout the year.

Additionally, chapters should consider including their benchmark of success (what was the goal? how was success measured?) to give the committee an understanding of the scope of the project. (Please note, the ideas listed above may not qualify a chapter for the Diamond award.)

SECTION VIII

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**CHAPTER TAX FILINGS
& FINANCIAL MANAGEMENT**

CHAPTER TAX FILINGS & FINANCIAL MANAGEMENT

Financial Oversight

The following policy recommendations are to ensure all chapter funds are being managed appropriately and those managing the funds are held accountable.

Code of Conduct

Chapter officers (President, President-Elect, Treasurer, Secretary) are required to sign a code of conduct at the start of each volunteer year. The code of conduct originated in an effort to protect chapter funds and the potential of fraudulent activity. It is available for download in the chapter portal and should be signed and submitted to National by June 15 each year.

Bi-Annual Chapter Bank Statements

Per the affiliate agreement, each chapter is required to submit two bank statements: the month of April and November.

Finance Committee

Chapters should develop a Finance Committee along with other fiscally responsible policies, to assist with the oversight of the chapter's finances. In addition, the executive committee should conduct quarterly meetings to review financial documents and bank statements.

Year-End Financial Summary

As part of the affiliate agreement, all chapters are required to submit a summary of their year-end financials for the previous fiscal year (June 1 – May 31). Statements should be uploaded through the chapter portal by June 30.

Chapter Leadership Team Responsibility

Upon scheduling a visit to a designated chapter, staff may conduct a financial overview if deemed necessary.

DMA Doing Business As ANFP

All IRS and bank forms will be filed as [State] Dietary Managers Association. Since the articles of incorporation (and tax numbers) did not change, the IRS still sees the organization as Dietary Managers Association (DMA). Other references will remain [State] Association of Nutrition & Foodservice Professionals.

Chapter Bonding and Liability Insurance

All chapter volunteers are covered by ANFP's bonding and liability insurance policy, beginning June 1 each year. Bonding insurance protects against fraud or theft by volunteers who have access to chapter funds. In the event of theft, the insurance reimburses the chapter for lost funds. Liability insurance covers property damage, personal injury, or other while conducting chapter business.

ANFP works with a broker every year to offer a group rate to affiliates. The parent organization does not benefit financially; it is a benefit offered to chapters and protection for volunteers. There is no application, and the amount is paid for from the first chapter rebate of the volunteer year. For annual coverage starting June 1, 2016, the amount for each chapter was \$135. Districts need to obtain a separate insurance policy. Contact chapters@ANFPOnline.org for details on the policy or to request to file a claim.

Tax Filings

Each state has different requirements for exempt (nonprofit) filings. Please check with your state for compliance.

Tax Return & Federal Tax Identification Number (FEIN)

Although ANFP is exempt from federal income taxation, each state chapter must file separately to keep tax-exempt status. Since districts are under of the state chapter's FEIN, all district financial activities should be included in any reporting or assessment.

Each chapter has its own FEIN assigned by the IRS. Chapters should not use ANFP Headquarters information when completing contracts or IRS forms. The FEIN is similar to a social security number, but for organizations; the number format is 12-345678. This is the identifying number for chapter bank accounts and other appropriate transactions. They are on file with ANFP Chapter Relations if you cannot find your chapter's FEIN.

IRS Form 990EZ or 990N E-postcard Filings

To file, see the "how to" on ANFPConnect. Nearly all organizations are subject to federal income tax under the Internal Revenue Code (IRC). However, ANFP Headquarters has applied for and been granted exemption from federal income taxes for both itself and on behalf of ANFP chapters under IRC Section 501c(6). This exemption applies to professional associations ONLY for income received which is directly related to our exempt purpose. The purpose is promoting education of nutrition and foodservice professionals and certified dietary managers in the field of nutrition and the science of foodservice.

When filing:

- Dietary Managers Association should be used as the **Chapter's Legal Name** on the filing
- **Doing Business As** should always be completed:
 - Recommended submission: New Mexico ANFP **or** New Mexico Association of Nutrition & Foodservice Professionals
- Failing to file a 990-N for 3 years will result in the revocation of group exemption status

CHAPTER TAX FILINGS & FINANCIAL MANAGEMENT

This does not exempt the chapter from paying ALL taxes. Federal income taxes must be paid on income not directly related to the exempt purpose, such as sales of mailing lists or advertising income. Also, state sales and use taxes must be paid on certain income, such as sales of merchandise or books. Laws vary by state, and you should check with the department of revenue in your state to ensure compliance with state laws. State chapters are not exempt from paying sales tax, except for items it will resell. If chapters resell items, they must remit the approved sales tax and collect and remit the required return.

The IRS requires small tax-exempt organizations whose gross receipts are normally \$50,000 or less to electronically submit Form 990-N, also known as the E-Postcard. The form must be completed and filed electronically on the IRS website. There is no paper form. **An organization that fails to file the required e-postcards will lose its tax-exempt status. A fine paid to the IRS will be required before being reinstated as a recognized nonprofit organization.** Since ANFP's tax year ends on May 31, each year, ANFP chapters will not be able to file the E-Postcard for previous year until June 1 and must be completed by October 15. Step-by-step instructions on how to file the 990EZ, are available on ANFP*Connect*.

If your chapter's tax-exempt status has been revoked, you will need to complete IRS Forms 1024 and 8718 and send in the requested fee. The status of the process can be found at <https://www.irs.gov/charities-non-profits/charitable-organizations/wheres-my-application>.

IRS Form 1099-MISC

If your chapter makes any payments that total \$600 or more in the calendar year to one person or organization (a speaker, for example) who is not incorporated, you must issue that person a 1099-MISC. This form can be obtained through your accountant, the IRS's website, or your local IRS office can supply one. It must be mailed to the recipient by January 31 and a copy must be filed with Form 1096 with the IRS by February 28. Please check with your individual state for filing requirements as some states require copies. All legal entities (lawyers), whether incorporated or not, must be issued 1099-MISC for legal services of \$600 or more.

<http://www.irs.gov/uac/Form-1099-MISC,-Miscellaneous-Income->

IRS Form W-9

Chapters should request a W-9 from all vendors (and paid speakers) and all vendors (and paid speakers) should request a W-9 from the chapter. Chapters should use their individual tax ID and contact information.

The chapter's individual tax ID number and contact information should be used.

<http://www.irs.gov/uac/Form-W-9,-Request-for-Taxpayer-Identification-Number-and-Certification>

All IRS forms will be filed as [State] Dietary Managers Association. Since the articles of incorporation (and tax numbers) did not change, the IRS still sees the organization as Dietary Managers Association (DMA). Other names will be [State] Association of Nutrition & Foodservice Professionals.

CHAPTER FINANCIAL MANAGEMENT

Invoice Payment

- Paying bills establishes a good credit rating for the chapter, but before paying, be sure the bill is accurate and an authorized expenditure
- Enforce a policy requiring receipts to be turned in to the treasurer before reimbursement. Approval for payment to an officer, committee member, or association member should be confirmed by state board, but each invoice does not have to be examined. This should be clearly stated in the chapter's policy and procedure manual. Guidelines for paying:
 - The check number and date of payment should be noted on each invoice as a record of payment.
 - Paid invoices should be filed alphabetically.
 - Separate paid invoice files should be maintained for each fiscal year and kept for annual audit.
 - Record all checks in a check register, etc.
- Do not pay bills with cash. Checks and credit cards can verify any questions that arise
- Never give a blank check (signed or unsigned) to anyone. The treasurer is responsible for association funds. Protect yourself and the members' funds
- The program chair should have copies of arrangement confirmations, room charges, number of meals, etc.

Accounting Records

Make sure the association is financially sound. Good bookkeeping practices mean that future treasurers can easily determine operating fees for one fiscal year.

Retention of Financial Records

KEEP 7 YEARS	KEEP PERMANENTLY
<ul style="list-style-type: none">• Cash disbursements ledger• Cash receipts ledger• Banks statements• Canceled checks• Deposit slips• Paid invoices• Expense reports	<ul style="list-style-type: none">• Annual financial reports• Contracts and agreements• Correspondence with IRS and other governing agencies (tax returns, 990, etc.)

- It may be advantageous to store certain records at a storage facility to avoid transferring large quantities of documentation to future treasurers.
- Each incoming treasurer and president should be informed where the documents are and how to access them.

Bank Accounts

- All association accounts should be at one bank.
- Checks should have the following information displayed:
 - [State] ANFP/Association of Nutrition & Foodservice Professionals
 - Treasurer's Address
 - City, State Zip
- Chapter checks should *not* include an individual's name
- To help prevent fraud or theft, it is strongly encouraged chapters use checks as form of payment for all transactions and avoid using debit cards if possible,
- If feasible, chapters should rent a P.O. box and include this address on their checks and for all chapter related mailings
- If you are opening a new account, ANFP is a nonprofit organization. (Each chapter is also registered as a 501(c)6) with the IRS. Inquire about nonprofit benefits and waived charges.
- Each chapter has a unique federal tax ID number and is registered as an affiliate of ANFP. These are on file at headquarters if you do not remember yours.
- Have a written policy requiring checks to be signed at time of purchase, not before.

CHAPTER FINANCIAL MANAGEMENT

- The checking account should have sufficient funds to pay anticipated expenses. This must take into consideration of account cash flow. Every chapter will have periods when income is high but expenses are low, and vice versa.
- The savings account should have sufficient funds equal to approximately one year's operating expenses of the association. Savings can be placed in an interest-bearing account with a bank, savings, and loan, or in the form of a certificate of deposit.
- If state meeting attendance is large, you may have to advance a pre-determined amount of money to the proper chair to provide adequate operating funds for the spring and fall meetings. If that is the case, you may consider open a separate account for meeting planning.
- If your chapter changes banks or opens a new bank account, notify ANFP immediately at chapters@ANFPonline.org. The chapter will need to complete the ACH form to receive biannual rebates. The form can be requested from finance@ANFPonline.org.
- All ANFP authorized disbursement checks or withdrawals should include the signatures of two of the following officers: Treasurer, President, and/or President-Elect.
- The authorized signature card with the Treasurer, President, and President-Elect's signatures shall be on file at the bank that holds the chapter account.

Reconciling the Bank Account

- Each month the bank will send a statement along with canceled checks, which you are responsible for reconciling. Reconcile (balance) your bank statement immediately to avoid confusion of more transactions.
- Banking online can allow you to reconcile at any time.
- Review bank statement and verify all checks with the individual amounts on statement. Charges that do not have a canceled check are usually bank service charges. These need to be recorded in your cash disbursement ledger and subtracted from the balance in your check register prior to reconciling the bank statement.
- Record checks that have cleared and verify that they are cleared for the same amount recorded in the check register. Prepare a list of all outstanding checks.
- Verify all deposits have cleared the bank and amounts recorded by bank are the same as those recorded in check register. Prepare a list of deposits that the bank has not yet recorded (deposits in transit). Any deposits with no record may be interest. This amount must be recorded in ledger and added to the balance in check register prior to reconciling the bank statement.
- Start with ending bank balance. Add any deposits in transit, and subtract any outstanding checks. This figure should equal balance shown on check register. Make sure all outstanding checks were added to bank balance. If you still find a difference, the bank can offer assistance; bring along canceled checks and check record from the past several months.
- After reconciliation is complete, the statements should be stored with canceled checks in monthly sequence.

Chapter Fundraising Policies

The following policies are designed to ensure all chapters are following federal, state, and local regulations and requirements for various activities including fundraising and political contributions. Additionally, these policies are to ensure chapters notify all interested parties of the chapter's tax-exempt status and how it relates to fundraising and receipt of contributions.

Fundraising Purpose

The primary purpose of ANFP's state affiliated associations (chapters) is to provide education and networking at the state and local levels, along with advocacy efforts when appropriate, in the development of the profession of providing optimum nutritional care through foodservice management. Chapters are funded primarily through the receipt of rebates from the ANFP National organization based on the number of members in that chapter and the chapter's compliance with the conditions and terms of their affiliation agreement and applicable policies. Chapters also may receive revenue from chapter-sponsored educational events and meetings.

State affiliated chapters are not required to engage in fundraising. The ANFP National board, however, understands that chapters occasionally desire to engage in fundraising as a way to build community within the local chapter. Whenever a chapter engages in any type of fundraising, the chapter treasurer must be involved. In addition, when planning for fundraising, chapters should consider the following:

- Organize a fundraiser only if a purpose is determined; in other words, fundraising is not allowed simply to "get more funds" for the chapter. An appropriate purpose might be to

CHAPTER FINANCIAL MANAGEMENT

support sending chapter volunteers to participate in an ANFP National meeting to learn how to better operate the chapter, or to raise money to pay for better educational speakers for chapter events.

- Evaluate the initial investment of time and resources to undertake the fundraising. Is there a lot of start-up time and investment involved? Are that time and investment worth the expected result?
- Fundraising at meetings should not be used to underwrite the expense of the meeting. Meetings should be self-supporting (break-even) or make a slight profit. Registration fees should be set at a level that will cover meeting costs. If the chapter has an excess of cash, consider providing a free educational event for both members and non-members in the profession.

Fundraising Disclaimer: All chapters are required to include the following statement disclosing ANFP's tax exempt classification on all fundraising/donation forms and solicitation materials:

ANFP Chapters are established as 501(c)(6) organizations. They are not charitable organizations. No funds paid or gifts donated to an ANFP chapter may be deducted as a charitable contribution for federal income tax purposes.

Important Background: ANFP and its chapters are classified under the Internal Revenue Code and regulations as tax-exempt 501(c)(6) organizations (also known as "business leagues"). Organizations classified as tax-exempt under 501(c)(6) are not considered charitable organizations, may not solicit charitable contributions, and are not eligible to receive charitable deductions or other benefits of charitable organizations, such as qualifying as charitable under state tax and gaming laws.

I. Fundraising Related to Charitable Gaming, Raffles, & Other Games of Chance: Federal lottery and gambling laws prohibit promoting any giveaway or game of chance that has the three elements of prize, chance, and consideration (e.g., buying an entry ticket). Such games of chance are considered an illegal giveaway, and at least one of the three elements would have to be eliminated in order for promotion and conduct of the giveaway or game of chance to be legal under federal law. This is especially true for any giveaway conducted online.

Due to chapter leaders and volunteers being held personally liable, and the potential impact on ANFP as a whole, ANFP strongly discourages chapters from hosting or conducting any fundraising activities involving giveaways, gaming, raffles, and other games of chance. Chapter leaders and/or volunteers may face consequences for not following federal and state laws governing games of chance or for failing to obtain the proper state or local permits or licenses required to conduct giveaways, raffles, "charitable gaming," or other games of chance. Federal, state, and local (e.g., county, city) laws and regulations apply, and each governing authority may use different terms to describe these activities. Thorough research must be conducted by each chapter prior to engaging in any such activities to ensure that all federal, state, and local requirements are followed.

Should chapters fail to comply with all applicable federal, state, and local requirements, including obtaining the proper permits or licenses for any games of chance (including bingo, pull tabs, card games, raffles, etc.), the following consequences may occur (penalties may vary based on the location):

- Chapter leaders may be held personally liable for knowingly participating in gaming or other games of chance without a license which could result in criminal or civil penalties.
- Any person who engages in illegal gambling under federal laws may be subject to criminal or civil penalties.
- Any person who files a fraudulent state or federal tax information return (and fails to disclose donations from charitable gaming or fundraising activities) may face felony charges.
- Licensing, permits, or failure to obtain either and the resulting consequences will vary from state-to-state and across local governing bodies.

If Chapter Proceeds With Gaming, Raffles & Other Games of Chance

If your chapter or district decides to engage in a giveaway, raffle, bingo, or other games of chance for fundraising, consider the following:

- Chapters may need to file for a license with the state or local governing authority's charitable

CHAPTER FINANCIAL MANAGEMENT

gaming division every single time a raffle or other game of chance is held. This varies from state to state.

- Check in advance as to what licensing and permits may be required as regulations vary across states, counties, and municipalities.
- Chapters that do not obtain a license or permit where required may face hefty fines and/or penalties, which will be at the expense of the chapter.
- Check if a permit with the local governing body, such as a county or municipality, is required.
- Inquire with your state and local governing bodies about proceeds and whether your chapter will need to pay a percentage or keep all proceeds within the state or locality.
- Check with your state and local governing bodies if your chapter must keep records on receipts, expenses and net proceeds for each event or occasion when winning chances are determined.
- Online and electronic (email, website, Facebook, Instagram, etc.) promotions or advertising of giveaways, raffles, and other games of chance are strictly prohibited.

If a chapter chooses to conduct any type of gaming activities, the following is required:

Proof of License/Permits/Registration: Notification of planned gaming activity to National and proof of gaming license, permit and/or registration (dependent on state and local requirements) is required to be submitted at least 30 days prior to the date of the planned activity to ANFP Chapters Department. If this is not a requirement in your state or locality, please send us the link or other information which confirms there are no requirements. This should be submitted to chapters@ANFPonline.org at the same time the CE prior approval application is submitted.

Report of Fundraising Activities: All chapters are required to report all planned fundraising activities prior to the activities taking place along with proof of required permits or licenses (i.e., games of chance), and disclose total funds raised, on the quarterly profit & loss statement submitted to National as well as within the annual 990-N (e-postcard) if total revenue is not in excess of \$50,000 or on the Form 990 or 990-EZ if total revenue is in excess of \$50,000. If chapters are conducting gaming or other games of chance on a regular basis (annually, semi-annually) they may be subject to federal UBIT (unrelated business income tax) and other fees within their state.

II. Fundraising Related to Grants: As ANFP chapters are 501(c)(6) organizations, all donations to chapters are non-tax deductible. If applying for a grant (federal, state, or private), inquire with the donor organization on its policy regarding applicant requirements and ensure the granting organization is aware of the chapter's tax-exempt status.

Should a chapter receive a grant (federal or state), chapters should understand how to account for and include this in their balance sheets, profit & loss statements, and other accounting records. They must also understand if the grant is restricted or unrestricted or how the granting organization intends the money to be used. If your chapter receives a grant, please contact our Finance Department at finance@ANFPonline.org.

III. Fundraising to Support the ANFP-PAC

By law (the Federal Election Campaign Act), ANFP members are eligible to make contributions to the association's Political Action Committee, ANFP-PAC. Members include professional, certified, retired, and allied professional members.

All donations (contributions) must be from personal funds using cash, check or credit card and must be accompanied with a PAC donation form. This form must include full name, address, e-mail address, and ANFP membership ID number, and signature. (Contributions are not tax deductible.)

For more information or to download the form and make an individual donation, please click on this link: <https://www.anfponline.org/news-resources/government-affairs/anfp-pac>.

Please note that chapters themselves cannot contribute to ANFP-PAC. If chapters receive individual donations, they must remit payments to ANFP-PAC along with the required PAC donation form completed by the individual PAC donor immediately following any collection of

CHAPTER FINANCIAL MANAGEMENT

donations. Also, because corporations are prohibited from contributing to ANFP-PAC, chapters should not accept such contributions from vendors at state meetings.

IV. Consequences for Failing to Follow Fundraising Policy

Failing to meet any of the above requirements for fundraising, or if fraud or intentional mismanagement relating to funds has occurred (following a financial review), any or all of the following consequences may result:

1. Warning Letter: The Chapter and/or any individual may receive a warning letter from the ANFP National President and/or National Board regarding non-compliance with the policy.
2. Withholding Chapter Rebate: Annual rebate based on number of members may be withheld indefinitely or until resolution of the non-compliance with policy.
3. Probation: The Chapter may be put on probationary status which may include additional oversight by ANFP National, limitation of activities, and/or withholding one or more portions of the annual chapter rebate.
4. Disqualification from Receiving Chapter Awards: Chapters violating the policy may be deemed ineligible for receipt of Chapter Awards. Chapters in which fraud or mismanagement of funds has occurred will automatically be deemed ineligible for chapter awards, including but not limited to the Diamond Award, for one or more subsequent years.
5. Ineligibility for Adversity Rebate: Chapters in which fraud or mismanagement of funds has occurred will automatically be deemed ineligible to apply for the adversity rebate the following volunteer year.
6. Possible Loss of Credential for Individuals: Individual(s) determined to have repeatedly violated this policy or to have engaged in fraud or involved with mismanagement of the chapter's fundraising or funds may be referred directly to the Ethics Committee with the possibility of losing their credential.
7. Withdrawal of Chapter Charter: Chapters engaged in repeated violations of this policy, including but not limited to mismanagement of funds, may be subject to withdrawal of their state affiliated association charter including loss of the right to use the ANFP name and loss of chapter funds.

Selling ANFP Merchandise

Per the affiliate agreement, the Chapter shall not be allowed to sell, purchase and re-sell ANFP or CDM, CFPP Branded merchandise items to local members.

As part of the affiliate agreement, all chapters are required to submit a summary of their year-end financials for the previous fiscal year (June 1 – May 31). Statements should be uploaded through the chapter portal by June 30.

CHAPTER FINANCIAL MANAGEMENT

Excess Funds

Any amount above the checking, savings, and operating expenses are considered excess funds. **They should be used to benefit members.** They should encourage and assist the development of the profession and advance skills related to the CDM position. Some include:

Quality Continuing Education

The registration fees for educational meetings are usually formulated to cover all program expenses and result in a slight profit. Excess funds may be used to underwrite some meeting expenses, thereby lowering the registration fee, and making it possible for more members to attend.

Officer Assistance to Attend Annual Meeting or Regional Meetings

Having officers attend national or regional meetings strengthens the communication link between national, states, and districts. Most states pay only a portion of officers' expenses to the meeting. Travel and registration are generally reimbursed. The individual or their facility usually pays for hotel and meals. Few states reimburse for the entire trip. Sharing expenses allows the chapter to assist more members with this benefit.

Promote Your Association

Information brochures are available (free) through ANFP Headquarters. A direct mail campaign to administrators, nurses, dietitians, corporate sponsors, etc. will enhance the professional image and spread awareness to allied professionals. Contact allied associations for mailing lists.

Charter a Bus to Attend Annual Meeting or a Regional Meeting

A state chapter may have a travel chairperson. They can inquire about the cost of renting a bus, then submit the quote to the treasurer for approval. This service can increase the number of members from your state who will attend and gain networking connections and clock hours.

Donate to the Nutrition & Foodservice Education Foundation

NFEF supports the goals of ANFP and works to strengthen the overall nutrition and foodservice profession in several ways. By strengthening the profession overall, the Foundation helps support its vision of a society made healthier through enlightened nutrition and foodservice practices. For more information, go [HERE](#).

Whistleblower Policy

The Association is committed to preventing reprisals against employees and members who report activity undertaken by other Association employees or members in connection with: (i) the performance of official Association activity that may be in violation of any state or federal law or related regulation; or (ii) the Association's corporate accounting practices, internal controls, or audit (collectively referred to as "Protected Disclosure").

The Association, and any individual associated with the Association, will not:

- Retaliate against an employee or member who has made a Protected Disclosure or who has refused to obey an illegal or unethical request, or otherwise harass or cause such persons to suffer adverse employment consequences; or
- Directly or indirectly use or attempt to use the official authority or influence of their position for the purpose of interfering with the right of an employee or member to make a Protected Disclosure to Association leadership.

CHAPTER FINANCIAL MANAGEMENT

Compliance Officer

The Association's Treasurer shall act as the Compliance Officer and is responsible for investigating and resolving all reported complaints and allegations concerning Protected Disclosures and, at his or her discretion, shall advise the President/CEO and/or the Audit/Finance Committee. The Compliance Officer has direct access to the Association's Audit/Finance Committee. The Association's Compliance Officer is also the Chair of the Association's Audit/Finance Committee.

Reporting Violations

The Association has an open door policy and suggests that employees and members share their questions, concerns, suggestions or complaints with someone who can address them properly. In most cases, an employee's supervisor is in the best position to address an area of concern. In the case of a chapter complaint, chapter volunteers should contact the Chapter Relations Manager at ANFP HQ. The Chapter Relations Manager will do a preliminary investigation to determine if submission should be escalated to the Compliance Officer. However, individuals should always feel free to contact the Association's Compliance Officer directly, if they so choose. Supervisors are required to report suspected violations to the Association's Compliance Officer, who has the responsibility to investigate all reported violations.

Accounting and Auditing Matters

The Audit/Finance Committee shall address all reported concerns or complaints regarding corporate accounting practices, internal controls or auditing. The Compliance Officer shall immediately notify the Audit/Finance Committee of any such complaint and work with the committee until the matter is resolved.

Confidentiality

Protected Disclosures may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

Handling of Reported Violations

The Compliance Officer will promptly notify the sender and acknowledge receipt of a Protected Disclosure (unless such report was submitted anonymously). All reports will be investigated promptly and appropriate corrective action will be taken if warranted by the investigation. Reports and copies of Protected Disclosures shall be retained by the Association in accordance with its record retention policy.

Our Doors Are Open to You

If you have suggestions or ideas that you feel would benefit the association, you are encouraged to tell us about them. We are always looking for suggestions that improve our methods, procedures and reduce costs or errors, and benefit the association and its members. These suggestions can be brought up to staff or submitted e-mail.

SECTION IX

**EDUCATION
MEETINGS**

EDUCATION MEETINGS

Upcoming ANFP Meetings

Details can be found [HERE](#).

DATE	EVENT	LOCATION
September 28-29, 2023	Regional Meeting	Costa Mesa, CA
June 10-13, 2024	Annual Conference & Expo	Reno, NV

Per the minimum standards at the beginning of this handbook, chapters only need to have one educational workshop per year.

Prior Approval of Continuing Education

For Chapter or District Use

Prior approval forms must be *submitted at least 8 weeks before the event*. Remember to read all instructions before submission to ANFP Professional Services. The chapter prior approval handbook and application are available on ANFPConnect.

Education Objectives and Obligations

Chapters must:

- Provide CDM, CFPP credential holders with quality programs that attendees can earn and report CE hours.
- Provide clearly stated and measurable learning objectives that are appropriate for the type and length of CE activity
- In terms of content and number of learning objectives.
- Ensure content and instructional design of the program are appropriate for the learning outcomes.
- Provide qualified personnel/staff/speaker/faculty to deliver the program in accordance with CBDM requirements.

The final submission must include all of the following attachments:

- Speaker/Trainer/Instructor requirements
- Program Timeline Agenda with Learning Objectives
- Program evaluation
- Sample certificate of attendance
- Complete Application

Any changes to the program or its trainer after approval has been granted must be reported to CBDM.

For Chapter or District Workshops:

- List state chapter as sponsor.
- Hours are calculated as 60 minutes for 1 CE hour; round to the nearest quarter hour.
- Registration, lunch, breaks, meeting time, etc. should not be counted.
- Include name, address, and phone for program coordinator.
- There is no application fee for ANFP chapter or district meetings.
- All attendees will need a certificate of attendance to report their own continuing education (CE) hours in their member login.

It is suggested that ANFP Chapters submit applications and supporting material at least eight weeks prior to the start date of the program/event to allow time for processing, corrections, and advance publicity. Anticipate a four to six week timeframe for approval from the date the application is received. Chapters that fail to submit the Prior Approval Application at least 30 days prior to the start of their program/event will be charged a \$50 fee in order to expedite the approval process.

All education programs must pertain to Nutrition and Medical Nutrition Therapy, Foodservice Personnel and Communications, Sanitation and Food Safety, Business Operations, and Leadership Health Care as they relate to foodservice management.

Activities ineligible for CE include: business meetings, introductions, welcome/orientation, networking/testing, registrations, wrap-ups/evaluations, breaks, meals without speakers, vendor equipment training, discussions of ANFP organizations or affairs, installation of officers, meetings of association officers or committees, training employees, new employee orientations, facility staff meetings, and social events.

EDUCATION MEETINGS

A certificate will need to be provided to each attendee as proof of attendance. They will then submit their own hours under their personal member login at www.ANFPonline.org. For more information about self-reporting, please go [HERE](#).

Planning for Chapter Meetings

Planning for chapters meetings takes time and well thought out plans. Below are tips and additional information for planning and executing a successful chapter meeting.

Finances

- Keep detailed records on all deposits and payments. Written documentation should always be received prior to paying an invoice. Inform all chapter leaders that receipts must be kept in order to be reimbursed for expenses. All invoices, payments and reimbursements should be paid with a check not cash.
- Talk with your treasurer about possibly opening a short term bank account. At least three volunteers should be on the account: program chair, treasurer, and president. No one should sign blank checks.

Site Selection

To choose a location for the meeting, select 3-4 possible sites. You may visit each venue to meet with the conference manager and take a tour of the property. Look at meeting rooms, sleeping rooms (if necessary), and note the appearance and housekeeping of the facility. If a person visit is not possible, check their website for:

Cost of Sleeping Rooms

- Ask if special rates are given for a block of rooms. If a pre-determined number of rooms are booked, you may receive complimentary (“comped”) rooms. These are usually used for speakers or other special guests.
- Find out what additional charges will be added to the quoted room rate (i.e. phone call charges, state tax, city tax, etc.). Will you be charged if the room block is not filled by the cut-off date? Know all of the deadlines from the hotel.
- Have the room rates confirmed in writing and note the pricing for single/double/triple occupancy. Rates should include dates beginning with the first expected arrival through the last expected departure.

Capacity of Meeting Rooms

- What set-up do you want for meeting rooms (theater, schoolroom, rounds, etc.)?
- Is the size appropriate for the size of the meeting? It must have space for an aisle, head table, speaking area/ podium, coffee service (if applicable), and audio/ visual equipment.
- Overcrowding tends to make attendees restless, the room too warm, and visuals difficult to see.
- If possible, serve meals in an adjoining room. If not, confirm how much time is required to reset the room.

Cost of Meeting Rooms

- Compare the policies of hotels you are considering and prices for meeting rooms if guests are occupying a specific number of sleeping rooms.
- Check on the ‘extras’ such as parking. Is there enough, and how much does it cost?

EDUCATION MEETINGS

Criteria for Meeting Sites

- Move the meeting to a different district each time. The district where the meeting is held is responsible for planning and executing the meeting.
- If your state is large, hold one meeting a year in a central location. For instance, a spring meeting can be central while the fall workshop is in the north and the next year it will be south.
- Another option is always holding the meeting in one central location. This may allow the chapter planners to set pricing and members can plan ahead.

Work with corporate sponsors to supply meeting locations. If you use this option, make sure to use a variety of vendors – using only one may seem like favoritism.

Menus and Meal Cost

- Obtain menus and price lists for meals that will be catered (coffee breaks, banquets, breakfasts, luncheons, and dinners). Discuss planned meals with catering manager. (Will you want table service or buffet?) Determine where meals will be served and reserve the appropriate space.
- Ask if you can make adjustments to menus, by what date, and if there will be an additional charge. Several hotels allow special menus (vegetarian, allergy, etc.).
- Obtain a written confirmation of meal costs. Many catering departments cannot quote a firm price until 3-6 months prior to event. Evaluate this cost before setting the meeting registration fee.

Exhibits

- Ensure there is enough room in the expo area for corporate sponsors and attendees to move around comfortably.
- Ask the hotel if there is a fee for the space used by vendors. Many hotels charge for each exhibitor; this charge should be covered in the exhibitor fee that you charge corporate sponsors.
- The hotel will usually provide tables, chairs, linens/draping for vendors, but this needs to be confirmed.
- Double check the availability of janitorial service to remove trash and clean up after exhibits close.
- Does the hotel allow corporate sponsors to bring in food? Some hotels only allow food served from their kitchens. Determine if corporate sponsors will have access to storing frozen and refrigerated products and if there is an extra cost. Which costs are the corporate sponsors responsible for? The chapter may be charged if this is not determined before contacting representatives.

Cancellation Policy

- Review the cancellation policy to establish obligations to hotel if the meeting is canceled, the site is changed, or if sleeping room commitment is not met. Hotels count on your business so be prepared to owe money if the agreement does not follow through as promised.

Payment of Invoices

- Is a deposit required to reserve meeting space? Full payment may be required on the last day of the meeting. Review a copy of the hotel invoice with the treasurer before writing a check.
- You may choose to establish a master account with the hotel. All meeting charges can then be on one account, rather than separate bills for A/V equipment, room charges, meals, etc. A master account may require a credit check of the chapter. Allow only a few people to sign this account; every invoice assigned to master account must have signature of one of these individuals. Don't allow individual expenses to be billed to this account.

EDUCATION MEETINGS

Signing a Contract

- The selected hotel/venue will expect you to sign a contract. This binding agreement will be in writing and must be signed by both the hotel and the chapter president. This will protect both parties as well as hold each to their commitments.
- Review to ensure details discussed with hotel sales manager are included.
- Keep contract and all documents for meeting are kept organized in a binder.
- Consider other venues or facilities to hold meeting. Meetings can be held at hotels, vendor's facility, member's facility, convention center, private hall, etc. All venues should consider the details listed above.

Topics

- Use the Speaker Directory for topic and speaker ideas. This is updated annually by ANFP's Professional Services. <http://connect.anfponline.org/volunteerresources>
- Discuss the content and suggest that you and the speaker review together before finalizing the program. Also review handouts in advance is applicable.
- Refer to meeting evaluation forms from previous meetings. Not all topics need to be healthcare related.
- Keep in mind ANFP members work in a variety of healthcare settings such as corrections, schools, etc. Dietitians and administrators may also be present; they may be more willing to let employees attend if topics are also relevant to their roles.
- Schedule time for the state spokesperson to update the membership on government affairs updates.

Speakers

- Contact speakers as soon as possible, at least five months in advance. Refer to the Speaker Directory for industry speakers.
- Determine which one person/chapter member will contact speakers. Avoid confusion among speakers and volunteers.
- Communicate with the speaker details of the meeting: anticipated attendance, brief review of association and its members, length of presentation, date, location, etc.
- If your initial contact is by phone or in person, follow up with a letter or e-mail.
- Determine any required speaker fees or which expenses will be reimbursed. Know the amount of money budgeted for this before contacting them.
- Chapters should present all speakers with a gift of thanks, even if there is no other fee.
- Ask audio/ visual needs of each speaker and reserve these with the hotel. There may be extra costs.
- All speakers should receive a Speaker Information Form to complete prior to submitting the Prior Approvals application. This can be found on ANFPConnect.

EDUCATION MEETINGS

Sample Proposed Program

OCTOBER 1		
1PM	5PM	Orientation of New Board Members and Committee Chairs
7:30PM	9PM	Board Meeting
OCTOBER 2		
7:30AM	9AM	Registration and Coffee
9AM	10:15AM	Opening Session (Speaker A)
10:15AM	10:30AM	Break
10:30AM	12:00PM	Session (Speaker B)
12:00PM	1:30PM	President's Lunch / Business Meeting
1:30PM	3:00PM	Session (Speaker C)
3:00PM	3:15PM	Juice Break
3:15PM	4:45PM	Session (Speaker D)
6:00PM	7:00PM	Social Hour (Cash Bar)
7:00PM		Banquet / Installation of Officers
OCTOBER 3		
9:00AM	10:30AM	Session (Speaker E)
10:30AM	10:45AM	Coffee Break
10:45AM	12:15PM	Session (Speaker F)
12:15PM	12:30PM	Evaluation and Adjourn
12:30PM	2:30PM	New Board and Committee Meeting

Corporate Sponsors

- Contact vendors in your state to build a partnership at the state meeting. Vendors may be able to buy advertising space, supply coffee breaks, offer product samples, give notepads and pencils, provide bags for pre-meeting packets and materials, or provide or sponsor a speaker.
- Send a copy of meeting promotions to each vendor; it may include a list of items available for sponsorship.
- After the meeting, thank corporate sponsors for their support of ANFP.

For more information, tools, and resources, please see the [Chapter Sponsorship Toolkit](#) on ANFPConnect in Volunteer Resources.

Promotion/Marketing

- Each member of the planning committee can be responsible for specific areas (speakers, expo, marketing, etc.). Delegation can keep it manageable.
- Remember that you are selling a product – your meeting! Flyers and brochures should be eye-catching and professional. Templates and clip art can be found at <https://templates.office.com>.
- Encourage members to take them to their facilities and also show administrators.
- Send members a 'save the date' as soon as a contract is signed so that they can plan ahead. Once an agenda is finalized, members can present this to their facilities. If clock hours have not yet been approved, a note at the bottom can say a variation of, "7 CEs have been requested".
- Mailings or e-mail blasts can be planned two months before the meeting.
- Meeting details can also be placed in the chapter newsletter and on the chapter website.

EDUCATION MEETINGS

Registration

- Establish an early registration procedure. For those who pay prior to the meeting, keep an organized list of each name, contact information, payment received, number of days attending, and type of attendee (member, administrator, student, etc.).
- PayPal: Please note, if you are using a PayPal link for registration, please allow 7-10 business days for ANFP headquarters to convert the code into a link/widget to be posted on the chapter website.
- At the entrance of the meeting, there may be a table with an attendee packet:
 - Program schedule
 - Name badge and holder
 - Evaluation form
 - Certificate of attendance
 - Any tickets needed for extra events
- Be prepared to supply receipt for attendees.

Follow-Up/Thank You Notes

Prepare and distribute an evaluation to all those that attended the meeting. Use the feedback (good or bad) to plan for the next meeting.

Thank you notes are important and appreciated. Make this gesture part of your routine to send thank you letters to speakers, corporate sponsors, hotel staff, and any guest who assisted in the meeting. These must be mailed in a timely manner, usually within a week of the meeting.

ANFP Suggested Dress Code

As a professional association, projecting a respected image is important. Business casual dress is recommended for all ANFP events. Below is a description of business casual dress:

For Women:

Dress and Skirts

- Avoid low-cut dresses or those with high slits.
- Avoid dresses (especially) and skirts that are more skin-tight.
- No sundresses.

Pants/Slacks

- Opt for pants such as khakis, linen pants or dress pants.
- Remember that skirts and dresses are acceptable as long as the hem falls just above the knees.
- No jeans, unless otherwise noted.
- Neutral colors are best.

Shirts/Blouses

- Shirts and blouses, plain shirts, cotton shirts, sweaters, turtlenecks, vests, and sleeveless shirts are all acceptable. (Opt for conservative and not too revealing) Tucked-in or untucked can both go, depending on the shirt
- Unusual patterns are acceptable, as long as they are not wild. The standard, however, is a monotone shirt.
- Use a collar for a more formal look, and collarless shirts for a less formal look.

Footwear

- Leather or leather-like shoes, flat trouser shoes, high heels; no open toed shoes. Avoid flip flops, sandals and sneakers.
- Heels are okay, so long as they aren't too conspicuous.
- Remember dress socks or pantyhose (with skirts or dresses) and tastefully accessorize with light jewelry and a simple purse.

EDUCATION MEETINGS

For Men:

Shirts

- Choose shirts that have collars, such as long-sleeve button down shirts. Always tuck the shirt in and pair the shirt with an appropriate belt. For business casual, tie is optional.
- White button-down shirts are the most formal and therefore the safest. Unlike pants, all manner of shirt colors are acceptable: Purple, pink, yellow, blue, and red.
- Choose shirts (and pants) in “formal” fabric: Cotton is king, and comes in many different flavors. Wool is acceptable, if itchy. Silk, rayon, and linen are frowned upon.
- Choose shirts in “formal patterns: Oxford, plaid, and poplin are a little less formal, but perfectly acceptable. Twill, herringbone, and broadcloth patterns are more formal and nice to use if sprucing up. Hawaiian and other irregular patterns are considered too casual.

Pants/Slacks

- Wear pants styles such as khakis, dress pants, trousers and corduroy pants. Jeans are not considered business casual.
- Pleated pants and dark colors are more formal, conservative choices. If you want to be on the safe side, overdressing is less frowned upon than underdressing.
- Pants should extend to the top of your shoe, or slightly longer. Pants that don’t reach down to your shoe are considered high-water pants; pants that fold and bunch up near the feet are considered too baggy.
- Avoid pants in loud colors such as red, yellow, and purple. Stick with black, brown, grey, khaki, dark blue and dark green pants.
- Consider pairing your shirt with a sweater or sweater vest. V-neck sweaters work best if wearing a collar.
- Turtlenecks can be worn in combination with a blazer for a sleek look and a little bit of novelty.
- If you want to wear a suit coat and still look business casual, dress it down with khakis instead of suit pants.

Footwear

- Select formal leather or leather-like shoes, and don’t forget the dress socks. Stick to black, brown, or grey shoes. Oxfords, lace-ups, and loafers are all standards.

Other Tips to Dress to Impress

Avoid the following items that do not fall under the category of business casual:

- Sneakers, sandals, flip-flops or other open-toed shoes.
- Sports shirts, t-shirts, sweatshirts, sport team jackets, and athletic socks.
- Shorts and capris.
- Jeans.

Ask yourself the following set of questions if you are still not sure whether your outfit is acceptable

- Would I wear this out to a club? The answer should be ‘no.’
- Would I wear this to sleep? The answer should be ‘no.’
- Would I wear this to do yard work? The answer should be ‘no.’
- Would I wear this to a costume party? The answer should be ‘no.’

SECTION X



APPENDIX

APPENDIX

These resources and *more* can be found under Volunteer Resources in [ANFPConnect](#).

- Chapter Rebate Requirements & Standards Checklist
- Chapter Leader Assignments & Rebate Requirement Checklist
- Meeting Planning Checklist
- How to Access the Chapter Portal
- Board Orientation Checklist
- How to Maintain Financial Records
- How to Use Parliamentary Procedure
- How to Set-up Succession of Officers & Volunteers
- How to Prepare Meeting Minutes
- How to Set Goals
- How to Run a Successful Election
- How to Prepare a Slate
- How to Deal With Conflict
- ANFP Style Guide
- How to Use the Chapter Portal
- Chapter Portal Guide
- How to Access Chapter Portal & Update Chapter Officer & Volunteers (Prior to 6-1)
- How to Access Chapter Portal & Add Chapter Officers & Volunteers (Post 6-1)
- How to Access ANFP member login, Chapter Portal & Award Nomination Forms