

Local Chapter Guide

How to Create, Develop, and
Maintain a PayrollOrg Local Chapter



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A Message from the Chapter Relations Department

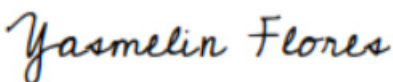
Thank you for your interest in starting a local chapter of PayrollOrg in your area or re-affiliating your chapter. The benefits of establishing and being a part of a local chapter are tremendous and can lead to **substantial personal rewards** as well as **opportunities that will energize your career**.

PAYO relies on its local chapters as a valuable source of information on state and local issues affecting its members in the payroll profession. As an added bonus, chapters remain an ideal venue for **frequent and productive networking** among local PAYO members. Each local chapter is applauded for being a vital part of the payroll community.

By expressing your interest in starting a chapter or re-affiliating your chapter, you have already taken the first step in the short process. From now on you can be assured that you have a reliable partner in PAYO, and we are dedicated to seeing you succeed in this endeavor. Establishing and developing your local chapter will still be a substantial amount of work, but as any chapter member will tell you, the sense of **fulfillment and satisfaction** you get in return will be well worth the effort.

Members of PAYO staff as well as local chapter members have helped compile the information contained in this guide. In it, you will find a great deal of practical information along with some indications of what you can expect. The information in this guide is not meant to be a strict blueprint for your chapter. Instead, you are welcome to introduce your personal touch to key components that will come to define the spirit of your chapter. Additionally, you can always call upon the Chapter Relations staff to assist with any aspects of establishing your new chapter.

We look forward to working with you to make your local PAYO chapter a success!



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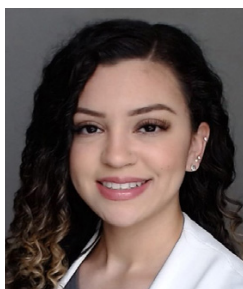
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What is a Local Chapter of PayrollOrg?

Now that starting a PayrollOrg (PAYO) Chapter has sparked your interest, it may help you to know exactly what a chapter is and how it is related to PayrollOrg National. Being that there are many ways that national organizations can choose to govern their chapters, it will help to have a clear understanding of PAYO's specific policies. Try not to let your experience or knowledge of other groups influence your perception of how a PAYO chapter can be run.

HERE ARE SOME KEY FACTS:

A PAYO chapter is a geographically localized group of individuals comprised predominantly of members of PayrollOrg.

PAYO-affiliated chapters are autonomous organizations that share the goals and support the initiatives of PayrollOrg.

PAYO chapters are independent from PAYO National.

Affiliated chapters are entitled to use the name and logo of PayrollOrg, providing them with instant name recognition and credibility among leaders in the payroll community.

Education of its members is the foremost goal of PAYO National.

Chapters do not pay dues or have any direct financial relationship with PAYO National.

Bylaws and constitutions must incorporate a few basic rules of PAYO National, but are established by each chapter to meet the specific needs of the chapter's membership.

Local chapters are supported by, and in turn help support, PAYO National.

Please read the Chapter Policy Statement contained in its entirety to fully understand the rules of governing local chapters. If you have any questions, please contact the Chapter Relations Department at PAYO for assistance.

Summary of the PayrollOrg Chapter Policy Statement

Since its inception, the PayrollOrg (PAYO) has encouraged its members to establish local chapters. Currently, there are 101 active, affiliated local chapters. All of these local chapters were formed on the basis of the same philosophy – to provide services to the area’s PAYO members that complement the activities of PayrollOrg. For example, local chapters focus on state and local payroll issues that are not covered in depth through PayrollOrg National courses.

In 1986, a committee of PAYO members met to discuss issues related to local chapters. At that meeting, they formalized and documented the PAYO local chapter philosophy in what is referred to as PAYO’s Chapter Policy Statement.

The Chapter Policy Statement outlines the general principles upon which local PAYO chapters are founded. It defines what local

chapters are and provides guidelines intended to help them maintain their strength and health.

As the policy states, local chapters are intended to assist PAYO in communicating with, educating, and providing associated services to individuals interested in payroll and related issues. PAYO-affiliated chapters conduct their activities in a manner that will complement PAYO’s efforts and encourage membership and participation in PAYO National.

PAYO recognizes the necessity of autonomy and encourages independence at the chapter level so that each chapter can respond to the particular and changing needs of its members. The following are some of the fundamental “rules” of PAYO local chapters, which are outlined in the Chapter Policy Statement and apply to all chapters.

- Only members of PayrollOrg National are eligible to hold an officer position within the local chapter. Associate Members cannot be officers or head committees or boards. However, they may serve as committee members.
- As with PAYO National, membership in the local chapter level is available only to individuals. There are two categories of membership allowed at the local chapter level. The first category is comprised of local chapter members who are also active members of PAYO National; these individuals are referred to as Regular Members. The second group are those individuals who are members of the local chapter but do not hold active membership at the National level. These members are considered Associate Members.
- Because PAYO local chapters are, by definition, smaller groups of PAYO members, members of PAYO National must comprise at least 51% of the chapter’s membership, and Associate Members are invited to join only through sponsorship by a Regular Member.
- In order to avoid conflicts between chapter activities and those sponsored by PAYO National and to maximize participation at the respective events, local chapters must submit a proposed schedule of their meetings and events to the Chapter Relations Department. Chapters will be notified if any dates conflict.

Benefits that Chapters Typically Offer

Just as national organizations offer a wide array of benefits and programs for their respective members, so too do PAYO local chapters. Each chapter is encouraged to decide which benefits it will offer to members and how chapter programs will be administered. This autonomy is vital to ensuring that each chapter is able to respond to the specific needs and concerns of its membership. Below are some of the options chapters must consider. Many factors, such as the budget or level of participation, will dictate which ones are actually implemented.

- ◆ **Regularly Scheduled Meetings** – Chapter meetings serve as the foundation for the group to prosper. While regular meetings provide a venue to network and develop lasting friendships with fellow payroll professionals, and offer a great opportunity for members to learn about issues affecting payroll in their area, frequency of meetings is at the discretion of each chapter.

PAYO National can also provide speakers for local chapter meetings through its National Speakers Bureau.* In addition, chapter members can also earn RCHs for CPP and FPC recertification at meetings. Please submit a completed RCH Request Form to the Certification Department prior to the chapter event.
- ◆ **Chapter Newsletter** – Many chapters have newsletters that are distributed by fax, email, or regular mail. These newsletters keep members connected with chapter events and provide updates from various chapter officers and committees. Often the Chapter Government Liaison Officer will pass on new and pending regulatory and legislative information from PAYO's Government Relations Division via the chapter newsletter.
- ◆ **Chapter Websites** – Many chapters have informative websites with links to various local government agencies and information sources, including the PAYO website.
- ◆ **CPP/FPC Study Groups** – Many chapters offer CPP and FPC Study Groups to help members prepare for the CPP and FPC exams. This type of group learning experience can be vital to a person preparing for the CPP and FPC exams. Certified instructors also earn RCHs for CPP recertification.
- ◆ **Community Involvement** – Almost all PAYO chapters are involved with some type of community outreach to benefit local charities and educational institutions. Participating in these types of activities can give chapter members an immeasurable sense of satisfaction that comes only from helping those in need.
- ◆ **National Payroll Week** – Being involved with a chapter during NPW can be great fun! Over the years, chapters have created a wide variety of activities to commemorate NPW. Community outreach, educational outreach, government outreach and celebrations are just a few of the categories.
- ◆ **Global Payroll Week** – Celebrated the first week in May, GPW recognizes the importance of global payroll operations and the work of global payroll professionals. Like NPW, chapters can celebrate GPW in many ways.

*Certain benefits only apply to affiliated chapters within the U.S.

- ◆ **PAYO Education Grants** – Every year, PAYO local chapters are encouraged to nominate at least one chapter member for PAYO's Education Grants. Grants include a complete Congress registration including round-trip travel, copies of The Payroll Source®, free PAYO seminars, and other awards. Grant applicants must be active PAYO members in good standing with at least three years of payroll experience. For more information, visit payroll.org/members/edgrant/.
- ◆ **Leadership Opportunities** – All chapters have at least one leader, with many having 10 to 20 volunteer leadership positions. By taking on the responsibility of chapter leadership, one can hone the skills needed to succeed in today's competitive business world.
- ◆ **Special Events** – As a chapter member, one has the opportunity to attend special functions such as statewide meetings. Chapter members can choose to simply attend an event or be involved in the intense behind-the-scenes planning of these special functions.
- ◆ **Chapter of the Year Contest** – All PAYO chapters are encouraged to participate in the Chapter of the Year Contest. Being recognized as a member of an award- winning chapter looks great on a resume and during one's annual review.

Benefits of PayrollOrg Affiliation

The Chapter Relations Department of PayrollOrg (PAYO) is dedicated to supporting the projects and initiatives of all its affiliated chapters. PAYO supports its chapters in every aspect of their daily operations, including the exchange of chapter-related information, National Payroll Week, Congress, Certification Study Groups, and Statewide Conferences.

PUBLICATIONS INFORMATION

Chapter Relations uses all of the communication media available from PAYO to ensure chapters are informed of PAYO National initiatives, and so the membership at large is made aware of chapter-planned events and accomplishments. The department utilizes the PAYO publication PAYTECH, the Chapter Leaders Blog, and PAYO's website as the basis for its information exchange program.

- ◆ **PAYTECH's Chapter Network** – Highlights upcoming chapter-related deadlines, projects, and offers. Chapter Network also features accomplishments of chapters and local chapter members.
- ◆ **Chapters section of PAYO Website**
 - **Find a Chapter** – Find local chapters and their contact information with the online directory.
 - **Affiliate a New Chapter/Reaffiliate Your Chapter** – Start a new chapter or reaffiliate your existing chapter with PAYO.
 - **Rebrand your Chapter** - Learn all you need to know to rebrand your Chapter to PayrollOrg.
 - **Register/Find a Chapter Event** – Register a chapter one-day event, study group, statewide, or regional event with PAYO, or find one near you.
 - **Enter a Chapter Contest** – Earn national recognition by entering one of PAYO's several chapter contests.

- **Grow Your Chapter** – Grow your chapter with guides, forms, and other resources from PAYO.
- **Chapter Mentor Program** – Connect with experienced chapter leaders on the CHAMPS committee to overcome your chapter's challenges.
- **Chapter Leadership Summit** – Learn about PAYO's biennial event for chapter leaders.
- ◆ **Chapter Leaders Blog** – The Chapter Leaders Blog contains weekly articles with guidance, news, and chapter updates from PAYO's Chapter Relations Department, Board of Advisors, Chapter Recognition Committee, and local chapter officers.

NATIONAL PAYROLL WEEK AND CONTESTS

- ◆ **National Payroll Week (NPW)** – National Payroll Week can be an exciting and busy time for chapter members. Each year, chapters are involved in a wide array of community outreach activities, educational programs, and celebrations conducted with the full support of the Chapter Relations Department. For example, the department offers the following items:
 - Comprehensive NPW information, including:
 - Sample press releases
 - Sample proclamation requests
 - Sample proclamation language
 - Sample teaching guides for NPW presentations
 - NPW sponsor contact information

NPW contests feature valuable prizes for those chapters that distinguish themselves during NPW. All winners in the below categories, except the National Education category, will receive a personalized Award Certificate, recognition in PAYTECH and the Chapter Leaders Blog, digital web banners for use on chapter websites and email signatures, and bragging rights for one year. Other prizes include:

◆ **Educational Outreach & Community Service Chapter Contest**

- **First Place** - One registration to attend PAYO's Congress
- **Second Place** - One registration for PAYO's Preparing for Year-End Seminar or Webinar series (live or on-demand)
- **Third Place** - A free subscription to the *Payroll Source Online*

◆ **Local Government Outreach Chapter Contest**

- **First Place** - One registration to attend PAYO's Congress
- **Second Place** - One registration for PAYO's Preparing for Year-End Seminar or Webinar series (live or on-demand)
- **Third Place** - A free subscription to *The Payroll Source Online*

◆ **Local Media Outreach Chapter Contest**

- **First Place** - One registration to attend PAYO's Congress and a NPW Award Certificate with your chapter's name
- **Second Place** - One registration for PAYO's Preparing for Year-End Seminar or Webinar series (live or on-demand)
- **Third Place** - A free subscription to the *Payroll Source Online*

◆ **Chapter Promotion Contest**

- **First Place** - One registration to attend PAYO's Payroll Congress
- **Second Place** - Three registrations for any PAYO webinars (live or on-demand)
- **Third Place** - A free online subscription to *The Payroll Source*®

◆ **NPW Individual Activity Contest**

- **First Place** - One registration to attend PAYO's Preparing for Year-End or any other PAYO one-day seminar
- **Second Place** - A free subscription to the *Payroll Source Online*
- **Third Place** - One registration for any of PAYO's Webinars (live or on-demand)

◆ **Online Survey Promotion Contest**

- **First Place** - One registration to attend PAYO's Congress
- **Second Place** - Three registrations for any of PAYO's Webinars (live or on-demand)
- **Third Place** - A free subscription to the *Payroll Source Online*

◆ **NPW Photo Contest**

Winning chapter photos will be published in the January edition of PAYTECH magazine.

◆ **National Education (Regional) Contest**

The region with the most registered chapter volunteers will be published in the January edition of PAYTECH magazine.

OTHER AWARDS

◆ Chapter of the Year Contest

The Chapter of the Year Contest provides chapters with an opportunity to be recognized for their tremendous support of PAYO's membership and their excellence. It also allows chapters to conduct self-evaluations of their procedures and accomplishments and to set goals for the upcoming year.

Contest winners are recognized and awarded a banner during the Chapter Exchange at PAYO's Annual Congress.

- Gavel Awards (Innovator, Mentor, Communicator, Facilitator)
- Chapters' Choice Awards

- ◆ Chapter Pictorial Awards (First through third with honorable mentions)
- ◆ Best Chapter Website Awards (First through third with honorable mentions)
- ◆ Best Statewide or Regional Meeting (First through third with honorable mentions)

OTHER BENEFITS

◆ CPP and FPC Study Groups

The Chapter Relations Department supports all educational events sponsored by chapters. A listing of CPP and FPC Study Groups with contact information is posted on PAYO's website. A free copy of PAYO's Payroll Source Online is offered to any CPP study group with 10 or more participants. A free copy of PAYO's Payroll Practice Fundamentals e-book is offered to any FPC study group with 10 or more participants. PAYO brochures are also available to chapters for these meetings. Please submit a completed RCH approval form to Certification Department at RCHChapter@payroll.org prior to the chapter event.

◆ Chapter Statewide Meetings*

The Chapter Relations Department sends PAYO brochures for all participants free of charge. The Chapter Relations Department also sends one door prize, per statewide meeting, at no cost. Additionally, each Statewide Event Committee can request one speaker from PAYO's National Speakers Bureau to speak at a meeting. Please submit a completed RCH approval form to Certification Department at RCHChapter@payroll.org prior to the chapter event.

◆ CHAMPS

The Chapter Relations Department offers a mentor referral program exclusively for PAYO's local affiliated chapters in need of help from other more experienced chapters. CHAMPS, which stands for Chapters Helping PAYO-chapters Make Payroll Shine, was established to provide a "chapter-to- chapter" referral and networking service for PAYO chapter members to turn to when confronting unique challenges. Individual chapter member volunteers from all over the U.S. have signed up to help you and your chapter in more than 80 chapter management categories!

*Certain benefits only apply to affiliated chapters within the U.S.

◆ Congress

Local chapters can count on playing a lead role at PAYO Congress. The chapter(s) residing in the Congress area are invited to host the Local Chapter Hospitality Booth. Chapter members hand out information about their chapter to attendees, and provide information to attendees about local entertainment and dining opportunities.

The Chapter Exchange is the only event at Congress that is exclusively for chapter members. All chapter members are encouraged to attend this important event to meet with the Board of Advisors and other PAYO VIPs, hear about upcoming chapter-related projects, and enjoy the camaraderie of local chapter members. Awards are also presented during the Chapter Exchange.

A Congress chapter workshop is also offered. This is a great opportunity for chapter members to learn from those who have dedicated years to making their chapters succeed.

◆ PAYO Logo

All chapters are permitted to use the PAYO National logo on their brochures and meeting notices. This nationally recognized logo establishes immediate credibility and the respect PAYO has worked diligently to earn over the years. This credibility allows the chapters to recruit new members and speakers. The PAYO National logo must be less prominent than the chapter logo to avoid confusion about a National event versus a local chapter event.

◆ Organizational Support

The Chapter Relations staff supplies chapters with sample chapter benefits information, sample member questionnaires, job responsibilities for chapter officer positions, and sample chapter bylaws.

◆ Board of Advisors

Chapters are divided into nine regions. Each region is supported and guided by one advisor. This represents the interests of chapters at annual board meetings, and will present the board with chapters' concerns or ideas for improvements. This advisor is a liaison with PAYO National and can offer support throughout the year.

◆ Mailing Lists*

All chapters may request mailing lists for PAYO National members in their area. These are very helpful for launching successful membership recruitment campaigns or alerting members in the area of a chapter-sponsored educational opportunity. Each chapter may receive two mailing lists a year or one every six months.

When new members join PAYO National, they automatically receive a welcome email encouraging them to join their local chapter. The message includes a link to the chapter area of PAYO's Website so that members can easily locate and contact their nearest local chapter.

*Mailing lists may not be available to chapters outside of the U.S. due to privacy restrictions (e.g., GDPR).

Chapter Event Guidelines

All chapter events must adhere to the guidelines and policies listed below. Chapters that do not comply with these guidelines may face sanctions, including loss of eligibility for chapter contests; loss of support from PayrollOrg; and loss of chapter charter.

REGULAR CHAPTER MEETINGS

Regular chapter meetings are commonly held in person on a monthly, bimonthly, or quarterly basis. Such meetings can be attended by chapter officers, chapter members, potential chapter members, and guests. Normally, chapter business and updates are discussed along with an educational topic.

1. Recertification Credit Hour (RCH) Approval for Chapter Meetings

- a. A regular chapter meeting can range from 1 to 3 hours in length.
- b. Chapters must submit [Local Chapter RCH Program Application](#) to PAYO's Certification Department at least 45 days before the chapter meeting.
- c. Marketing material may not display a stated number of RCHs approved, pending, or submitted until final approval is granted by PAYO's Certification Department.

2. Timing of Regular Chapter Meetings

- a. To avoid conflicts and competition between chapter meetings and PAYO events, regular chapter meetings may not be held within 45 days of a virtual PAYO seminar/course on a similar topic or an in-person seminar/course in the same city as the chapter.
 - The PAYO course schedule will be emailed to the current chapter officers every fall for the next year. Chapter leaders can also request a full list of PAYO courses by emailing ChapterRelations@payroll.org.

3. PAYO-Arranged Speakers

- a. Regular chapter meetings will have a limit of one PAYO-arranged speaker (a National Speakers Bureau member, PAYO staff member, or PAYO National Representative) present per meeting, chosen at PAYO's discretion.
- b. Chapters must submit the [Speaker Request Form](#) at least 90 days before the meeting to request a PAYO-arranged speaker. If not received at least 90 days before the event, a speaker may not be found and provided.
- c. Chapters must follow the established procedures and contract guidelines set by PAYO's Speaker Administration Department.
- d. Prior to the meeting, the chapter will receive an estimate of all associated costs for which it will be responsible. This includes the speaker's fee as well as any travel and incidental expenses. In most cases, a deposit will be required to confirm the speaker.
- e. After the meeting, the chapter will receive an invoice from PAYO for the speaker fee and all associated costs which have not yet been paid.
- f. Once a PAYO-arranged speaker's attendance is confirmed, requests to provide additional presentations must be made to PAYO's Speaker Administration Department and are not confirmed until agreed to in writing by PAYO and the speaker. The final details of the speaker's engagement may not be amended, edited, or verbally changed.

4. Use of PAYO Intellectual Property

In creating, compiling, or acquiring content for regular chapter meetings, the chapter may not copy, distribute, transmit, display, publish, sell, license, create derivative works of, or otherwise use any PAYO Intellectual Property as defined in Section 7 of the PAYO Policy Statement Regarding Chapter Affiliation without the express written consent of PAYO.

5. Virtual Components of Regular Chapter Meetings

- a. Virtual attendance of regular chapter meetings should only be offered to current chapter members. Non-chapter members are not permitted to attend a virtual chapter meeting. A special exception to this rule will be granted during state-mandated restrictions on in-person gatherings.
- b. Virtually attended meetings must be offered through the Zoom account provided by PAYO in order to ensure RCH eligibility.*
- c. Chapters may host in-person meetings with virtual speakers as often as desired.

CHAPTER ONE-DAY EVENTS AND MULTI-DAY EDUCATIONAL SEMINARS

A chapter one-day event or multi-day educational seminar is an event outside of regular chapter meetings, usually a special celebration or educational session, although it may include the conduct of some chapter business. These events and seminars can be attended by chapter officers, chapter members, potential chapter members, and guests. Examples include: an NPW celebration, an all-day year-end meeting, and an educational series taking place over one or two consecutive days (i.e., Friday and Saturday).

1. RCH Approval for Chapter One-Day Events and Multi-Day Educational Seminars

- a. Chapters must submit the [Register a Chapter Event](#) form at least 45 days before the chapter event or seminar.
- b. Chapters must submit the [PAYO Local Chapter RCH Program Application](#) to PAYO's Certification Department at least 45 days before the chapter event or seminar. The event or seminar must be registered first before RCHs are requested.

2. Timing of Chapter One-Day Events and Multi-Day Educational Seminars

- a. In order to avoid conflicts and competition between chapter events and PAYO events, chapter one-day events and multi-day educational seminars may not be held within 45 days of a PAYO seminar/course on a similar topic in the same city as the chapter.
- b. Chapters that hold one-day events in lieu of a statewide/regional meeting may not hold their event within 50 miles of the Payroll Congress location in the same year. Generally, Congress locations are announced at least 5 years in advance.
- c. Chapter one-day events and multi-day educational seminars may not be held within 15 days of PAYO's Congress (including the in-person Congress and Virtual Congress).

3. PAYO-Arranged Speakers

- a. Chapter one-day events and multi-day educational seminars will have a limit of one PAYO-arranged speaker (a National Speakers Bureau member, PAYO staff member, or PAYO National Representative) present per event, chosen at PAYO's discretion.

*This restriction only applies to affiliated chapters within the U.S.

- b. Chapters must submit the [Speaker Request Form](#) at least 90 days before the event to request a PAYO-arranged speaker. If not received at least 90 days before the event, a speaker may not be found and provided. The event or seminar must be registered first before a speaker is requested.
- c. A PAYO-arranged speaker can present workshops and keynote addresses totaling a maximum of three hours per event or seminar.
- d. Chapters must follow the established procedures and contract guidelines set by PAYO's Speaker Administration Department.
- e. Prior to the event or seminar, the chapter will receive an estimate of all associated costs for which it will be responsible. This includes the speaker's fee as well as any travel, hotel, and incidental expenses. In most cases, a deposit will be required to confirm the speaker.
- f. After the event or seminar, the chapter will receive an invoice from PAYO for the speaker fee and all associated costs which have not yet been paid.
- g. Once a PAYO-arranged speaker's attendance is confirmed, requests to provide additional presentations must be made to PAYO's Speaker Administration Department and are not confirmed until agreed to in writing by PAYO and the speaker. The final details of the speaker's engagement may not be amended, edited, or verbally changed.
- h. A PAYO National Representative will have 5-10 minutes during a one-day event or seminar to present "PAYO Updates." The "PAYO Updates" do not count against the three-hour limit per event.

4. Support From PAYO

Approved chapter one-day events and multi-day educational seminars receive the following free support from PAYO:

- a. A certificate for a one-year subscription to *The Payroll Source® Online* to be used for a prize drawing
- b. A certificate for one PAYO webinar to be used for a prize drawing
- c. PAYTECH Jr. magazines (if available)
- d. Certification postcards for Certified Payroll Professional (CPP) and Fundamental Payroll Certification (FPC) exams (if available)

5. Use of PAYO Intellectual Property

In creating, compiling, or acquiring content for chapter one-day events and multi-day educational seminars, the chapter may not copy, distribute, transmit, display, publish, sell, license, create derivative works of, or otherwise use any PAYO Intellectual Property as defined in Section 7 of the PAYO Policy Statement Regarding Chapter Affiliation without the express written consent of PAYO.

6. Virtual Components of Chapter One-Day Events and Multi-Day Educational Seminars

- a. Chapters may host virtually attended one-day events and multi-day educational seminars only if an in-person event or seminar cannot be held.
- b. Chapters may host in-person chapter one-day events and multi-day educational seminars with virtual speakers as often as desired.

7. Chapter One-Day Events and Multi-Day Educational Seminars Attendee List*

Once a chapter event or seminar has ended, the list of all attendees must be sent to the Chapter Relations Department within 30 days. The list must be in an Excel spreadsheet containing:

- Chapter name
- First name
- Last name
- Company name
- Address
- City
- State
- Zip code
- Country
- Phone
- Email
- Number of RCHs awarded

Failure to submit the list no later than 30 calendar days after the chapter event or seminar ends may result in future restrictions being placed on the chapter by PAYO including: loss of eligibility for chapter contests; loss of support from PAYO; and loss of chapter charter. As part of the chapter event registration process, registrants must be notified that their contact information will be provided to PAYO and that they may be contacted by PAYO after the event or seminar by phone, email, etc.

STUDY GROUPS

A study group is an instructional course designed to cover the knowledge, skills, and abilities listed within the content outline of the CPP/FPC exams. This course can range from a one-day session to multiple sessions over several days and should be designed to prepare attendees to sit for the CPP/FPC exams.

1. RCH Approval for Study Groups

- Chapters must submit the [Register a Study Group](#) form at least 45 days before the study group.
- Chapters must submit the [PAYO Local Chapter RCH Program Application](#) to PAYO's Certification Department at least 45 days before the study group. The study group must be registered first before RCHs are requested.

2. PAYO-Arranged Speakers

- Study groups will have a limit of two PAYO-arranged speakers (National Speakers Bureau members, PAYO staff members, and/or PAYO National Representatives) present per study group, chosen at PAYO's discretion.
- Chapters must submit the [Speaker Request Form](#) at least 90 days before the study group session to request a PAYO-arranged speaker. If not received at least 90 days before the session, a speaker may not be found and provided. The study group must be registered first before a speaker is requested.
- Chapters must follow the established procedures and contract guidelines set by PAYO's Speaker Administration Department.
- Each PAYO-arranged speaker can present study group sessions totaling a maximum of three hours.
- Prior to the event, the chapter will receive an estimate of all associated costs for which it will be responsible. This includes the speaker's fee as well as any travel and incidental expenses. In most cases, a deposit will be required to confirm the speaker(s).
- After the event, the chapter will receive an invoice from PAYO for the speaker fee and all associated costs which have not yet been paid.

*Local chapters are responsible for obtaining the necessary consent from each attendee so that attendee information may be shared with PAYO (e.g., to comply with GDPR regulations).

- g. Once a PAYO-arranged speaker's attendance is confirmed, requests to provide additional presentations must be made to PAYO's Speaker Administration Department and are not confirmed until agreed to in writing by PAYO and the speaker. The final details of the speaker's engagement may not be amended, edited, or verbally changed.

3. Support From PAYO

Study groups receive the following free support from PAYO:

- a. One subscription for a year to *The Payroll Source*® *Online* for a CPP Study Group coordinator*
- b. One *Payroll Practice Fundamentals* e-book for an FPC Study Group coordinator*
- c. Free publicity on the PAYO website

4. Study Group Citations

PAYO recognizes Study Group Coordinators for their time and dedication in volunteering to help their chapter. Study Group Coordinators named on the [Register a Study Group](#) form will receive a Study Group Citation from PAYO.

5. Use of PAYO Intellectual Property

In creating, compiling, or acquiring content for study groups, the chapter may not copy, distribute, transmit, display, publish, sell, license, create derivative works of, or otherwise use any PAYO Intellectual Property as defined in Section 7 of the PAYO Policy Statement Regarding Chapter Affiliation without the express written consent of PAYO.

6. Virtual Components of Study Groups

- a. Chapters may host study groups in a virtual platform environment or in-person with virtual instructors through the Zoom account provided by PAYO to ensure RCH eligibility.
- b. There is no limit on the number of times chapter study groups may meet virtually within a calendar year.

7. Study Group Attendee List**

Once a study group has ended, the list of all attendees must be sent to the Chapter Relations Department within 30 days. The list must be in an Excel spreadsheet containing:

- | | | |
|------------------|------------|------------------|
| ▪ Chapter name | ▪ Address | ▪ Phone |
| ▪ PAYO ID number | ▪ City | ▪ Email |
| ▪ First name | ▪ State | ▪ Number of RCHs |
| ▪ Last name | ▪ Zip code | awarded |
| ▪ Company name | ▪ Country | |

Failure to submit the list no later than 30 calendar days after the study group has ended may result in PAYO placing future restrictions on the chapter, including: loss of eligibility for chapter contests; loss of support from PAYO; and loss of chapter charter. As part of the study group registration process, registrants must be notified that their contact information will be provided to PAYO and that they may be contacted by PAYO after the event by phone, email, etc.

*Must have 10 or more participants to receive free subscription/e-book.

**Local chapters are responsible for obtaining the necessary consent from each attendee so that attendee information may be shared with PAYO (e.g., to comply with GDPR regulations).

STATEWIDE/REGIONAL MEETINGS

A statewide/regional meeting is a conference hosted by more than one chapter or hosted by one chapter with multiple chapters in the same region attending or invited to attend in person. An affiliated chapter or chapters must be registered as host(s) on the [Register a Chapter Event](#) form to be considered a statewide/regional meeting.

Statewide/regional meetings must adhere to the guidelines outlined below. Any statewide/regional meetings not conforming to the guidelines and their host(s) may be subject to sanctions including loss of eligibility for chapter contests; loss of support from PAYO; and loss of chapter charter.

1. RCH Approval for Statewide/Regional Meetings

- a. Chapters must submit the [Register a Chapter Event](#) form at least 45 days before the statewide/regional meeting.
- b. Chapters must submit the [PAYO Local Chapter RCH Program Application](#) to PAYO's Certification Department at least 45 days before the statewide/regional meeting. The event must be registered first before RCHs are requested.
- c. Marketing material may not display a stated number of RCHs approved, pending, or submitted until final approval is granted by PAYO's Certification Department.

2. Timing and Schedule Approval for Statewide/Regional Meetings

- a. No statewide/regional meetings may be held in the same month as PAYO's Congress.
- b. No statewide/regional meeting may be held within 50 miles of the Payroll Congress location in the same year. Generally, Congress locations are announced at least 5 years in advance.
- c. Chapters must abide by the Chapter Marketing Guidelines, found below, to avoid conflicts with other statewide, regional, and national events.
- d. A statewide/regional meeting schedule, excluding pre-conference registration, may not encompass more than three days or 72 consecutive hours (i.e., noon Wednesday through noon Saturday).

3. Statewide/Regional Meeting Boards

- a. All statewide/regional meeting boards should be formed under the supervision of the associated chapter(s).
- b. Every chapter associated with a statewide/regional meeting must be represented on the statewide/regional meeting board or committee by at least one active chapter member who is a chosen representative for the chapter. If no willing chapter participant can be found, contact the Chapter Relations Department at chapterrelations@payroll.org.
- c. In order for any statewide/regional meeting to receive speaker, promotional, and other support from PAYO, all chapters associated with the meeting must be currently affiliated and in good standing with PAYO.

4. PAYO-Arranged Speakers*

- a. Statewide/regional meetings may have a limit of two PAYO-arranged speakers (National Speakers Bureau members, PAYO staff members, and/or PAYO National Representatives) present per year, chosen at PAYO's discretion.

*Certain benefits only apply to affiliated chapters within the U.S.

- b. The first PAYO-arranged speaker fee is paid for by PAYO. If two speakers are requested, the chapter(s) must pay the speaker fee for the additional PAYO-arranged speaker.
- c. Prior to the event, the chapters will receive an estimate of all associated costs for which they will be responsible. This includes the second speaker's fee (if two speakers are requested) as well as any travel, hotel, and incidental expenses. In most cases, a deposit will be required to confirm the speaker(s).
- d. After the event, the chapter will receive an invoice for all associated costs which have not yet been paid.
- e. Chapters must submit the [Speaker Request Form](#) at least 90 days before the statewide/regional meeting to request a PAYO-arranged speaker. If not received at least 90 days before the event, a speaker may not be found and provided. The event must be registered first before a speaker is requested.
- f. Each PAYO-arranged speaker can present workshops and/or keynote addresses totaling a maximum of three hours per event.
- g. Chapters must follow the established procedures and contract guidelines set by PAYO's Speaker Administration Department.
- h. Once a PAYO-arranged speaker's attendance is confirmed, requests to provide additional presentations must be made to PAYO's Speaker Administration Department and are not confirmed until agreed to in writing by PAYO and the speaker. The final details of the speaker's engagement may not be amended, edited, or verbally changed.
- i. The PAYO National representative will have 20 minutes during a General Session to present "PAYO Updates." These "PAYO Updates" do not count against the three-hour limit per event.
- j. All Speakers must be in person. Virtual presentations are not allowed for statewide/regional meetings. A special exception to this rule will be granted during state-mandated restrictions on in-person gatherings.*

5. Support From PAYO

Statewide/regional meetings receive the following support from PAYO:

- a. A certificate for one discounted PAYO Congress registration to be used for a prize drawing**
- b. A certificate for one free PAYO webinar to be used for a prize drawing
- c. A certificate for a one-year subscription to *The Payroll Source® Online* for a prize drawing
- d. PAYTECH Jr. magazines (if available)
- e. Discounted PAYO membership for statewide attendees
- f. PAYO will cover the speaker fee for one National Speakers Bureau speaker, PAYO staff speaker, or PAYO National Representative (chosen at PAYO's discretion). All other associated fees for travel, hotel, and incidentals will be paid by the statewide/regional meeting's host chapters.***
- g. Free publicity on the PAYO website

*This restriction only applies to affiliated chapters within the U.S.

**The statewide/regional meeting hosts must agree to present the discounted Congress registration giveaway in a drawing at a highly visible time and must promote this major door prize in statewide marketing materials. All promotions should include the tagline "Go to PAYOcongress.com for more details about the biggest payroll event of the year" and include the PAYO logo.

***Certain benefits only apply to affiliated chapters within the U.S.

- h. A mailing list of PAYO members in the statewide/regional meeting's service area. The one-time use list must be requested by the host chapter through the [Local Chapter Mailing List Request Form](#) and will not count against the chapter's annual mailing list allotment.*
- i. If PAYO staff will be an exhibitor at the Statewide, PAYO will provide a certificate for a Payroll Source Plus to be awarded to the winner after the event via email by PAYO. If a PAYO staff member attends but does not exhibit, PAYO will email the Coordinator the certificate after the event for giveaway.

6. Use of PAYO Intellectual Property

In creating, compiling, or acquiring content for Statewide/Regional Meetings, the chapter may not copy, distribute, transmit, display, publish, sell, license, create derivative works of, or otherwise use any PAYO Intellectual Property as defined in Section 7 of PAYO Policy Statement Regarding Chapter Affiliation without the express written consent of PAYO.

7. Virtual Components of Chapter Statewide/Regional Meetings

- a. Chapters may not host virtually-attended statewide/regional meetings or sessions. A special exception to this rule will be granted during state-mandated restrictions on in-person gatherings.
- b. Chapters may not host in-person sessions with virtual speakers for statewide/regional meetings. A special exception to this rule will be granted during state-mandated restrictions on in-person gatherings.**

8. Statewide/Regional Meeting Attendee List***

Once a statewide/regional meeting has ended, the list of all attendees must be sent to the Chapter Relations Department within 30 days. The list must be in an Excel worksheet containing:

- | | | |
|------------------|------------|------------------|
| ▪ Chapter name | ▪ Address | ▪ Phone |
| ▪ PAYO ID number | ▪ City | ▪ Email |
| ▪ First name | ▪ State | ▪ Number of RCHs |
| ▪ Last name | ▪ Zip code | awarded |
| ▪ Company name | ▪ Country | |

Failure to submit the list 30 calendar days after the statewide/regional meeting has ended may result in future restrictions being placed on the chapter by PAYO including: loss of eligibility for chapter contests; loss of support from PAYO; and loss of chapter charter. As part of the statewide/regional meeting registration process, registrants must be notified that their contact information will be provided to PAYO and that they may be contacted by PAYO after the meeting by phone, email, etc.

*Lists will only be provided to affiliated chapters within the U.S.

**This restriction only applies to affiliated chapters within the U.S.

***Local chapters are responsible for obtaining the necessary consent from each attendee so that attendee information may be shared with PAYO (e.g., to comply with GDPR regulations).

Chapter Marketing Guidelines

All chapters must adhere to the guidelines and policies listed below. Chapters that do not comply with these guidelines may face sanctions including: loss of eligibility for chapter contests; loss of support from PAYO; and loss of chapter charter.

Advertising or marketing includes traditional methods and social media.

1. **Traditional marketing:** including, but not limited to, brochures, mailings, save-the-date announcements, chapter websites, emails, and advertisements.
2. **Social media:** considered to be, but not limited to, Facebook, Twitter, LinkedIn, Instagram, social media posts, pages or groups, and blog posts.
 - a. PAYO's Chapter Relations Department must receive copies of all marketing outreach including emails, brochures, postcards, save-the-date announcements, etc. upon distribution.
 - b. All materials (including brochures, websites, save-the-date announcements, emails, advertising, etc.) must prominently display a PAYO logo, PAYO tagline, and a link to PAYO's website (PAYO will provide style guide with placement suggestions, language options, and logos for download).
 - c. PAYO's Chapter Relations Department must be invited/allowed to join all the chapter or chapter event social media groups and/or pages.
 - d. All social media page/group descriptions and blog sites must include language about PAYO and a link to PAYO's website.
 - e. Chapters must not schedule events that conflict with other chapters' nearby events, PAYO virtual seminars/courses, and PAYO in-person seminars/courses held nearby.
 - f. Chapters must submit the agenda for chapter one-day events and regular meetings to the Chapter Relations Department 30 calendar days prior to the first meeting date. The Chapter Relations Department must be made aware of any changes to the proposed schedule after submission.
 - g. Under no circumstances should a comparison to any other chapter or PAYO be made in any marketing or advertising. A cooperative atmosphere must always be maintained. Competitive comparisons are not allowed.
 - h. Chapters should avoid advertising or marketing to geographic regions represented by another chapter, including on social media sites and other digital platforms. Chapters may, however, advertise to previous event/meeting attendees in these regions who have been added to the chapter's contact list or database.

How to Get Started

Now that you know what a PAYO local chapter is and how it works, you're ready to get into the planning stages of this exciting endeavor. Letting your colleagues in the area know that you are interested in starting a chapter will be key to building the momentum necessary to get the chapter going. As more people become aware of your interest and enthusiasm, you will begin to form the core of the soon-to-be chapter. **Note:** These steps are intended primarily for U.S.-based chapters. International chapters may be subject to more restrictions regarding marketing and list sharing.

1. Contact the Chapter Relations Department at PAYO National. They can provide valuable guidance and advice based on the experience of other chapters, as well as practical items like a mailing list of PAYO members in your area. They can also team you with other PAYO chapter representatives in your area to learn first-hand from experts.
2. Request a CHAMPS Mentor referral by visiting PAYO's website, and clicking on the Chapters link.
3. Send a letter and questionnaire to all of the PAYO members in your area – this will help generate much-needed awareness and assistance.
4. Evaluate questionnaire responses to gauge the level of interest among PAYO members in the area. Remember, this is the basis of starting a chapter, so don't expect everything to happen overnight.
5. Contact those people who responded and schedule an organizational meeting.
6. Maintain your interest and enthusiasm – these are the most essential ingredients in starting a successful local chapter of PAYO. You'll find that your desire can become contagious if you have a positive attitude.

Instructions for Sending Your Initial Interest Letter

A critical step in starting a chapter is drafting letters that you will send to PAYO members and other payroll professionals in your area. The letters should explain the benefit of a local chapter and encourage their involvement. Include a questionnaire in these initial packets and ask payroll professionals to complete and return it to you. Their responses will allow you to gauge the level of interest in the area.

Consider writing two separate letters – one for PAYO National members and one for individuals who may not be familiar with PAYO. This will allow you to tailor the content of the letters to match the knowledge of the reader. Obviously, the letter to non-members will include some background on PAYO, while the letter to members will include more about the added benefits of local membership. Sample letters and a questionnaire can be found in this packet for your convenience. You are welcome to modify them or create your own if you would prefer. Be sure to include your return address information on the questionnaire, and provide a specific date by which you want the questionnaire returned.

Once your letter and questionnaire are ready, send them to the Chapter Relations Department at PAYO along with a completed Local Chapter Mailing List Request Form. For best results, provide PAYO with an accurate ZIP code range covering the areas from which you would expect people to attend.

Following receipt and approval of your letter and questionnaire, PAYO will email the list of National members in your designated area within 10 business days. The next step is to mail them out and await responses.

It is unlikely you will get responses from everyone who receives the letter. You should realistically expect a response rate of anywhere from 25%-50%. No matter how many people respond, it is likely more people will attend your first formal chapter meeting than answered the questionnaire.

Compile the results of the questionnaires; this information will be useful when it comes time to plan your regular chapter meetings. The most useful information on the returned questionnaires will be the names and telephone numbers of people who responded. They should be contacted via telephone if possible. Introduce yourself, thank them for their interest, and invite them to a preliminary, informal meeting for respondents.

A press release submitted to business journals and other newspapers can be another way to attract payroll and finance professionals to your new chapter. Additionally, many media sources offer free postings of meeting information, so be sure to take advantage of all these opportunities.

Sample Press Release for Your New Chapter

Members of PayrollOrg are working to establish a local chapter in [insert city name]. All area members of PayrollOrg, as well as Payroll, Human Resources, Benefits, and Financial Professionals, are welcome to attend their first meeting on [insert date].

Founded in 1982 as the nation's only professional association for payroll and related professionals, PAYO established the following objectives:

- **Build knowledge.** PayrollOrg is the authoritative source for education, training, certification, certificate programs, publications, and resources for payroll professionals worldwide.
- **Promote recognition.** PayrollOrg promotes payroll as a respected professional discipline and as an important strategic partner within organizations around the world.
- **Foster community.** PayrollOrg provides a community where payroll professionals engage with trusted industry peers to share expertise and network.
- **Engage in advocacy.** PayrollOrg represents payroll professionals before government agencies, resulting in a positive legislative and regulatory climate for the payroll industry.
- **Educate the public.** PayrollOrg provides public service education on payroll and employment issues.ed issues

"As a PAYO chapter, members will be joining a network of over 101 active, affiliated local chapters dedicated to supporting PAYO's guiding principles. Their goal will be to add a local flair by addressing regional payroll issues while providing opportunities for members to network with fellow payroll professionals from around [describe general area]," said Yasmelin Flores, Chapter Relations Manager for PayrollOrg.

Topics on the first meeting's agenda will include the nominations of officers, selecting a name for the chapter, and deciding upon a meeting site and schedule. Other organizational topics will also be discussed. This is an excellent opportunity for attendees to be involved in decisions that will define the chapter.

As the chapter grows, it will offer lively and entertaining meetings with informative speakers, an extensive newsletter, and a chapter Website. The chapter will strive to develop payroll-oriented educational opportunities such as CPP and FPC Study Groups and Payroll Symposiums. The chapter will also actively participate in fun and rewarding PAYO National-sponsored events such as the Chapter of the Year Award competition and National Payroll Week contests.

Becoming a member of this brand-new chapter is an opportunity to help it grow, and more importantly, it is an opportunity for members to grow within their chosen profession.

Contacts:

[Insert your contact information here]

Sample Introduction Letters

NON-PAYO MEMBERS

Members of PayrollOrg have established a local chapter in the [insert city] area. All payroll, human resources, benefits, and financial professionals are invited to complete the enclosed survey, so that we may gauge your interest and begin to explore a convenient time and location for our first open meeting.

Founded in 1982 as the nation's only professional association for payroll and related professionals, PayrollOrg established the following objectives:

- **Build knowledge.** PayrollOrg is the authoritative source for education, training, certification, certificate programs, publications, and resources for payroll professionals worldwide.
- **Promote recognition.** PayrollOrg promotes payroll as a respected professional discipline and as an important strategic partner within organizations around the world.
- **Foster community.** PayrollOrg provides a community where payroll professionals engage with trusted industry peers to share expertise and network.
- **Engage in advocacy.** PayrollOrg represents payroll professionals before government agencies, resulting in a positive legislative and regulatory climate for the payroll industry.
- **Educate the public.** PayrollOrg provides public service education on payroll and employment issues.ed issues

As an official PAYO chapter, we will strive to support these initiatives and prosper with the assistance of PAYO National in San Antonio, Texas. Our group will focus on monthly meetings featuring informative guest speakers and great networking opportunities; community outreach activities, especially during National Payroll Week; and payroll educational programs.

This is an excellent opportunity to be part of an organization that will help you grow in your chosen profession. Thank you for taking the time to complete this important survey. A representative from our group will contact you as soon as a meeting time and place have been established. We hope to see you there!

Sincerely,
[insert name here]

PAYROLLORG MEMBERS

Members of PAYO have established a local chapter here in [insert city] area. All payroll, human resources, benefits, and finance professionals are invited to complete the enclosed survey, so that we may gauge your interest and begin to explore a convenient time and location for our first open meeting. As a member of PAYO National, you can benefit greatly from being a local chapter member. If you have your Certified Payroll Professional (CPP) or Fundamental Payroll Certification (FPC) designation, our future meetings will be a source for you to earn RCHs toward your recertification. If you have yet to take the CPP or FPC exam, we hope to offer a CPP or FPC Study Group for all members.

As an official PAYO chapter, we will strive to support the initiatives of PAYO National and prosper with its assistance. Our group will focus on monthly meetings featuring informative guest speakers and great networking opportunities; community outreach activities, especially during National Payroll Week; and payroll educational programs.

This is an excellent opportunity to be part of a local group that will help you grow as a payroll professional and as a member of PAYO National. Local chapters are one of the proving grounds for members interested in taking on leadership roles in PAYO National. Be assured that your hard work and dedication to this chapter can lead to recognition and more involvement in your national association.

Thank you for taking the time to complete this important survey. A representative from our group will contact you as soon as a meeting time and place have been established. We hope to see you there!

Sincerely,
[Insert name here]

SAMPLE QUESTIONNAIRE SENT TO AREA MEMBERS

1. **How often do you feel chapter meetings should be held?**
☐ Monthly ☐ Bi-monthly ☐ Quarterly ☐ Other
2. **What day of the week is usually the best for you?**
☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday
3. **What time of the day is usually the best for you?**
☐ Morning ☐ Lunchtime ☐ Evening
4. **What topics are you interested in hearing about? Check as many as you wish.**
☐ Unemployment compensation
☐ Computer hardware and/or software
☐ Personal computer and payroll applications
☐ State and local tax regulations
☐ State disability reporting
☐ Interstate transfers of employees
☐ Payroll planning
☐ State unemployment insurance (SUI) reporting
☐ How to upgrade your job description
☐ Current changes in state and local legal requirements
☐ State and local garnishment laws
5. **Are there any topics that you would be willing to give a presentation about?**
6. **Does your company have a suitable meeting space for 25-30 people that could be used for a local chapter meeting?**
☐ Yes ☐ No
7. **Would you be willing to donate approximately one hour per month on a chapter committee?**
☐ Steering Committee ☐ Education Committee
☐ Membership Committee ☐ Newsletter/Website Committee
☐ Program Planning Committee
8. **Please provide your contact information:**
Name: _____
Title: _____
Company: _____
Address: _____
Phone: () _____ Fax: () _____
Email: _____

Thank you for your time. Please list additional comments on the back of this page.

At the Preliminary Meeting

The initial meeting of volunteers is very important. During this meeting, the group should have three major objectives.

The first will be to discuss what types of expectations each volunteer has for the chapter and what each member is willing to do to accomplish those objectives. It is important for the chapter to define itself and establish a clear set of goals and purposes. Only a chapter can determine its priorities and decide on the most appropriate means of accomplishing its goals.

The second major objective is to begin planning the first formal meeting of the local chapter. Discuss and decide upon the following items:

- Date of the meeting
- Time of the meeting
- Place for the meeting
- Educational value of the meeting

Divide the following duties among the initial group of volunteers:

- Who will be responsible for coordinating and making sure the meeting has an outline and a direction?
- Who will lead the meeting?
- Who will obtain a speaker?
- Who will make the meeting location arrangements?
- Who will make the meal function arrangements if the first meeting is a lunch/dinner meeting?
- Who will send out the announcements?
- Who will set up the room?
- Who will register the attendees?

The above items are only a few suggestions. Create your own personal checklist carefully to make sure that everything is taken care of.

The last objective of this preliminary meeting should be to complete the Application for Chapter Affiliation.

This step is perhaps the most critical and it requires a sense of leadership on your part. If you succeeded in getting a handful of people to attend your preliminary meeting, you have essentially created a chapter. These individuals have indicated that they want to be part of the chapter in some capacity. Your next challenge is to get a percentage of them to take on some of the responsibility associated with the chapter. Fortunately, you'll often find the types of people who show up at organizational meetings are eager to volunteer. Now there is no good reason to delay making your chapter official.

Many individuals who get to this point propose that the group find more members before establishing a chapter. This time-consuming process can rob your chapter of the momentum it needs to move forward. While membership growth is important to your chapter's success, your preliminary meeting should focus on being established.

Again, act quickly and take advantage of the enthusiastic atmosphere of this first meeting. Review the affiliation application and begin asking for volunteers for interim officers. Later, once the first few formal meetings have taken place and your chapter has begun to take shape, you can have a more formal election process and establish a full slate of officers for a one- to three-year term.

Sample Agenda

Remember to be yourself at this first meeting and rely on your genuine excitement about the prospect of a chapter to shine through. Your sincerity will go a long way towards influencing others to join you.

1. Introduce yourself and describe your reasons for wanting to start a chapter.
2. Define what a PAYO chapter is.
3. Discuss what types of expectations each volunteer has for the chapter.
4. Ascertain what each member is willing to do to accomplish those objectives.
5. Begin to define the chapter and establish a clear set of goals and purposes.
6. Agree that there is adequate motivation to establish the chapter.
7. Discuss any dues the chapter may require.
8. Call for volunteers to serve as interim officers.
9. Sign the PAYO Application for Chapter Affiliation.

The Building Blocks of Chapter Success

Once you are officially under way, you and your members will need to start thinking about how your chapter will grow and become prosperous. Keep in mind these simple principles to ensure a bright future for your new chapter.

There are six fundamental areas on which all local PAYO chapters should focus. Each one is an equally important component of a successful local chapter:

Chapter Management

Characterized by voluntarism and measures that keep the needs of the membership as the primary consideration.

Service to the Payroll Profession

Celebrate the fact that your chapter does provide an important service, and let others know about it.

Service to PayrollOrg

This is characterized more by a sense of goodwill and cooperation rather than blind allegiance. Maintaining open channels of communication with PAYO National representatives can only improve the outlook of your chapter.

Government Services

You will find PAYO's Washington, D.C. contingent is the basis for this principle. Foster a relationship with PAYO's Director of Government Relations, Alice Jacobsohn, Esq., so that your chapter remains abreast of legislative and regulatory initiatives.

Membership Services and Development

By ensuring that members' needs are constantly updated and addressed and that new members are welcome, your chapter will continue to grow.

Educational Planning

Regular chapter meetings form the foundation of your educational plan and are reinforced with CPP/FPC Study Groups and statewide meetings.

Budgetary and Financial Concerns

This section applies to chapters in the United States.

◆ Financial Concerns

Financial concerns will ultimately determine the success or failure of your chapter. For that reason, keeping tabs on the chapter's funds must be a top priority. A chapter's financial responsibilities can be divided into five major categories:

- Keeping financial records
- Preparing accurate reports for the Board of Directors
- Budgeting
- Safeguarding financial assets
- Complying with applicable laws and regulations

Finding a responsible and trustworthy person to serve as the chapter's Treasurer will be an important step for you or the Board of Directors. This person should possess basic accounting and general financial management skills, and should be known on a professional basis by at least one other member of the group. In the beginning, it may be advisable to establish a Finance Committee to oversee the chapter's finances.

The Treasurer or Finance Committee will be responsible for selecting the method for the chapter's bookkeeping. It is probably best to keep things simple and rely on cash basis accounting rather than the accrual basis. This simple version is easier to understand, and reports to the chapter will be much easier to follow using this method.

◆ Tax Issues

Filing for tax-exempt status is a process that many chapters face with more than a little trepidation. There seems to be an endless list of forms to fill out and complicated procedures to follow. However, by dedicating some time to becoming familiar with some of the terms, forms, and agencies, the pieces to this giant puzzle can come together, allowing your chapter to stand on more solid legal ground.

◆ Tax Terms

Let's first establish the difference between not-for-profit and tax-exempt. Non-profit and not-for-profit are state law concepts. Most states have laws whereby an entity can be incorporated as a non-profit or not-for-profit organization. However, the fact that an entity is organized as a non-profit or not-for-profit organization does not indicate that it is also exempt from federal income tax.

How about, what's the difference between a 501(c)(6) and a 501(c)(3)? A 501(c)(3) entity is generally a charitable or educational organization. It can also be regarded as religious in nature, educational, scientific, or literary. The term charitable is used in its generally accepted legal sense and includes relief for the poor, the distressed, or the underprivileged; advancement of religion; or advancement of education or science.

An affiliated chapter of an association is usually classified as a 501(c)(6), which is defined as a business league but may be a 501(c)(3) organization if its primary purpose is education. In general, it is an association of persons having some common business interest, the purpose being to promote the common interest and not engage in a regular business of a kind ordinarily carried on for profit. The business league must be devoted to the improvement of business conditions of one or more lines of business as distinguished from the performance of particular services for individual persons. It must be shown that the conditions of a particular trade or the interests of the community will be advanced by its actions. No part of its net earnings may be apportioned to the benefit of any private shareholder or individual, and it may not be organized for profit.

◆ The Application Process

The IRS is the U.S. agency that grants organizations tax-exempt status. To gain this status, under 501(c)(6), a chapter must complete Form 1024, *Application for Recognition of Exemption Under Section 501(a) or Section 521 of the Internal Revenue Code*, electronically. This application is available on Pay.gov, must be completed in its entirety, and be accompanied by the appropriate user fee. Chapters should also request an employer identification number using Form SS-4, Application for Employer Identification Number, even if the chapter does not have any employees.

which must be signed by at least two persons, and be dated. The definition of an association can vary by state, so review those laws before proceeding. Review IRS Publication 557 for sample Articles of Organization.

- ◆ Next, your chapter must have an exempt purpose. Since chapters are dedicated to the improvement of business conditions in the payroll industry, the criteria for an exempt purpose is satisfied.
- ◆ When completing Package 1024, your chapter will need to have an Employer Identification Number (EIN). If your chapter has not yet requested one, do so by completing Form SS-4.
- ◆ Include a conformed copy of your chapter's organizing document in Package 1024. A conformed copy is one that agrees with the original and all its amendments. A chapter officer must certify that the document is a complete and accurate copy of the original.
- ◆ Financial statements for a three-year period must also be included. If your chapter is new, include financial statements for the current year and proposed budgets for the next two years, including a detailed breakdown of revenue and expenses. If your chapter has been established for more than three years, include the same type of financial information for the current year and the two preceding years.
- ◆ If the chapter plans to be represented by an attorney or CPA throughout this process, include a completed Form 2848, *Power of Attorney and Declaration of Representative*, authorizing the attorney or agent to represent the chapter.

THE PACKAGE 1024 PROCESS IS AS FOLLOWS:

- ◆ For the IRS to consider your chapter tax-exempt, your chapter must first be recognized as a trust, a corporation, or an association. In general, an association is a group that has come together for a specifically defined purpose. The association must have a written document such as "Articles of Association" showing its creation,

- ◆ When submitting Form 1024, the correct user fee must also be included. For 2024, the fee is \$600 and is subject to annual inflation adjustments.
- ◆ The IRS requires that Form 1024 be submitted electronically online at Pay.gov To submit Form 1024, you must:
 - Register or have previously registered for an account on Pay.gov.
 - Enter "Form 1024" or "1024" in the search box and select Form 1024.
 - Complete the form.
- ◆ To apply for tax-exempt status under 501(c) (3), complete Form 1023, *Application for Recognition of Exemption Under 501(c)(3) of the Internal Revenue Code*, or Form 1023-EZ, *Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code*.
- ◆ When submitting Form 1023 or Form 1023-EZ, the correct user fee must also be included. For 2024, the fee for Form 1023 \$600, and the fee for Form 1023-EZ is \$275. These fees are subject to annual inflation adjustments.

◆ Tax Filing Requirements

Generally, tax-exempt organizations must file an annual information return. Chapters can meet this requirement by filing a Form 990, *Return of Organization Exempt From Income Tax*, or Form 990-EZ, *Short Form Return of Organization Exempt From Income Tax*. The Form 990-EZ is designed for use by small tax- exempt organizations and nonexempt charitable trusts. A chapter can file a Form 990-EZ instead of Form 990 only if (1) its gross receipts during the year were less than \$100,000, and (2) its total assets (line 25, Column (B) of Form 990-EZ) at the end of the year were less than \$250,000. If your organization fails to meet either of these conditions, you cannot file Form 990-EZ. Instead, Form 990 must be filed. Form 990 or Form 990-EZ must be filed by the 15th day of

the 5th month after the end of your chapter's accounting period. The instructions for these forms indicate which IRS Service Center the forms must be sent to.

A tax-exempt organization that does not file the required return is subject to a penalty of \$20 a day for each day the failure continues. The same penalty will apply if the organization fails to give correct and complete information or required information on its return.

The maximum penalty for any one return is the lesser amount of \$10,000 or 5% of the organization's gross receipts for the year. If the organization has gross receipts in excess of \$1,000,000, the penalties grow to \$100 per day with a maximum penalty of \$50,000.

Even though an organization is recognized as tax-exempt, it still may be liable for tax on its unrelated business income. An exempt organization that has \$1,000 or more gross income from unrelated business must file Form 990-T, *Exempt Organization Business Income Tax Return*. The obligation to file Form 990-T is in addition to the obligation to file the annual information return. Tax- exempt organizations must make quarterly payments of estimated tax on unrelated business income. An organization must make estimated tax payments if it expects its tax for the year to be \$500 or more. Form 990-T of a tax-exempt organization must be filed by the 15th day of the 5th month after the tax year ends.

◆ Access to Information

Tax-exempt organizations must make their last three annual information returns and their approved application for recognition of exemption with all supporting documents available to the public for inspection. In keeping with the Taxpayer Bill of Rights 2, the organization is required to provide copies of these documents upon request without charge

(other than a reasonable fee for reproduction and copying costs) to any individual or agency requesting them. Penalties are assessed for failure to comply with these requirements.

◆ **More About Unrelated Business Income Tax**

Unrelated business income is income from a trade or business regularly carried on that is not related to the chapter's performance of its exempt purpose or function. An exempt organization that has \$1,000 or more gross income from an unrelated business must file Form 990-T, *Exempt Organization Business Income Tax Return*.

All organizations subject to Unrelated Business Income Tax (UBIT), except trusts, are taxable at corporate rates on that income. An activity is considered an unrelated business if it meets the following three requirements: (1) it is a trade or business, (2) it is regularly carried on, and (3) it is not substantially related to furthering the exempt purpose of the organization. There are a number of exclusions and modifications to this general rule that should be explored by a professional.

◆ **Get Professional Help**

This information is meant to be a guideline for you to get some idea of the process of having your chapter recognized as a tax-exempt entity. PAYO strongly suggests that you consult with a lawyer and an accountant before proceeding with your application.

In all circumstances a lawyer or CPA should at the very least review your application before it is sent to the IRS. For beginning chapters,

the thought of having to pay legal fees before any revenue has accumulated in the chapter treasury may be discouraging. This is a great time to reach out to friends who may be lawyers or know lawyers who may support your cause. If that doesn't work, contact the local Bar Association Pro Bono Committee or United Way for names of civic or philanthropy-minded lawyers who may review your documents for free. If all else fails, negotiate a reasonable fee with a lawyer, usually around \$500 or less to help process your documents.

If you're looking for a CPA to assist with tax considerations, check with PAYO to see if there are members in your area that are CPAs. You may have a chapter member who is a CPA and wouldn't mind taking on this project on a permanent basis. This could also be a great time to introduce yourself to your coworkers in the accounting department to see if one of them could help.

◆ **Bringing It All Together**

Filing for tax-exempt status will never be the easiest project that a chapter will undertake. But, once completed, the chapter can rest assured that it has substantially reduced the risk of receiving a potentially unpleasant phone call from the IRS. It will also be a great relief to know that probing questions from other government agencies and individuals can be answered without hesitation or concern.

By making the process a chapter-wide project, successfully completing this project will bring the principals of the chapter closer together, thereby strengthening the chapter as a whole.

◆ Find Out More

Become familiar with the following forms and publications:

- IRS Publication 557, Tax-Exempt Status for Your Organization
- IRS Publication 598, Tax on Unrelated Business Income of Exempt Organizations
- Section 501(c) of the Internal Revenue Code
- Section 501(c)(3) of the Internal Revenue Code
- Section 501(c)(6) of the Internal Revenue Code
- [Form 1023](#), Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code
- [Form 1023-EZ](#), Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code
- [Package 1024](#) Application for Recognition of Exemption Under Section 501(c)(6) of the Internal Revenue Code [Note: this form is used to apply for tax-exempt status under 501(c)(6). To apply under 501(c)(3) see Form 1023 and/or 1023-EZ above]
- [Form SS-4](#), Application for Employer Identification Number
- [Form 2848](#), Power of Attorney and Declaration of Representative
- [Form 8821](#), Tax Information Authorization
- [Form 990](#), Return of Organization Exempt From Income Tax
- [Form 990-EZ](#), Short Form Return of Organization Exempt From Income Tax
- [Form 990-T](#), Exempt Organization Business Income Tax Return
- [Form 8718](#), User Fee for Exempt Organization Determination Letter Request

Sample Bylaws

Bylaws of ABC Chapter of PayrollOrg – A Non-Profit Association

ARTICLE I – NAME

The name of this organization shall be the ABC Chapter of PayrollOrg (ABC PAYO).

ARTICLE II – PURPOSE

The purposes of the Chapter shall be:

- To increase the skill level of the payroll professional through education.
- To promote and enhance the image of the payroll profession throughout the state of [insert state].
- To provide payroll professionals with networking opportunities and a forum for the effective exchange of payroll knowledge, trends and ideas.
- To promote the highest standards of professional practice and payroll ethics.

ARTICLE III – MEMBERSHIP

Classes of Membership and Qualifications

Regular Member – All individuals must be active members of the PayrollOrg (PAYO National Member). It is a condition of membership that members are expected to share their knowledge and experiences and make a positive contribution to the Chapter.

Associate Member – Individuals who are not active members of the PayrollOrg may be Associate Members. The associate must be invited and sponsored by a Regular Member. As with the Regular Member, the Associate Member is expected to share his/her knowledge and experiences and make a positive contribution to the Chapter. Associate Members are subject to the following provisions:

- Only Regular Members may be elected or appointed as Chapter Officers or Directors.
- Regular Members will enjoy a reduced structure for dues and fees as compared to Associate Members.

MEMBERSHIP ADMISSION

Regular Membership – To be admitted to membership, a candidate must be actively engaged in or closely related to the payroll function within his/her organization, file a membership application, and accompany it with the first year's dues.

Associate Membership – To be admitted to membership, a candidate must be actively engaged in or closely related to the payroll function within his/her organization. He/she must complete the membership application, including the Regular Member's name who is sponsoring the Associate Member, and accompany it with the first year's dues.

TERMINATION OF MEMBERSHIP

Revocation of Membership – Members may be reprimanded, suspended, or expelled by the Board of Directors for violations of these Bylaws or the Code of Ethics or any other conduct that discredits the Chapter or the payroll profession.

Reinstatement of Membership – Any persons whose membership has been terminated may, upon written request and explanatory statement to the Board of Directors, have their membership reinstated upon a majority vote of the Board of Directors.

VOTING

Regular Members – Each Regular and Associate Member shall have one vote in the affairs of the Chapter.

Quorum – At least 25% of the members of the Association shall constitute a quorum. A majority of those present will determine all matters requiring a vote of the membership.

ARTICLE IV – DUES AND FEES

Dues Schedule

The Board of Directors shall determine the annual dues schedule for each level of membership.

Dues Payment

Regular & Associate Membership – The first annual dues of a new member shall be payable and submitted in full with the Membership Application.

Removal for Non-Payment

Members who fail to pay their prescribed dues and other obligations shall be dropped from the rolls and thereupon forfeit all rights and privileges of membership. Upon payment of delinquent dues or obligations, the member shall be reinstated.

Dues and Fees

The Board of Directors shall have the authority to set dues and fees for any class membership.

ARTICLE V – MEMBERSHIP MEETINGS

Regular

There shall be regular meetings of the general membership held at least bi-monthly on the second Thursday.

Special

The President or the Board of Directors may call a special meeting with written consent from 25% of the voting chapter members.

ARTICLE VI – BOARD OF DIRECTORS

Power and Responsibilities

The Board of Directors shall have supervision, control, and direction of the affairs of the Chapter; shall determine its policies or changes therein within the limits of the Bylaws; shall actively prosecute its purposes; and shall have discretion in the disbursement of its funds. It may adopt such rules and regulations for the conduct of its business as shall be deemed advisable, and may, in the execution of the powers granted, appoint such agents as it may consider necessary.

Composition

The Board of Directors shall be composed of the Executive Committee and up to five at-large Directors. The Executive Committee shall be comprised of the following officers: President, Vice President, Secretary, and Treasurer. All members of the Board of Directors shall be elected from the general membership with the exception of the Vice President (the Vice President will be the Immediate Past President). All members of the Board of Directors shall be Regular Members in good standing.

Election

The Board of Directors shall be elected by a majority vote of Regular and Associate Members present at a regularly scheduled meeting.

Term of Office

All members of the Board of Directors shall be elected annually by the members at the August meeting. New Officers/Directors shall take office October 1 following elections and serve through September 30 of the following year with a term of one year.

Meetings

The Board of Directors shall meet as deemed necessary between regularly scheduled Membership meetings upon the call of the President at such times and places as he/she may designate, and shall be called to meet upon demand of a majority of its members. Board of Directors meetings shall be open to Chairpersons of all active committees.

Quorum

A simple majority of the Board of Directors shall constitute a quorum.

Absence

Any member of the Board of Directors unable to attend a duly called meeting of the Board shall be required to notify the President of the Chapter two days prior to the meeting. The President may deem the resignation of the Director effective upon two consecutive unauthorized absences without notification by the Director to the President.

Resignation and Removal

Any Board of Directors member may resign at any time by giving written notice to the President, the Secretary, or the Board of Directors. Such resignation shall take effect at the time specified therein, or, if not the time specified, at the time of acceptance thereof as determined by the President or Board of Directors. A member of the Board of Directors may be removed from his/her position upon a two-thirds vote of the Board at a legally called meeting. Any Officer or Director subject to such a vote shall be granted the privilege to represent him/herself in person or in writing, either prior to or at the time of the vote.

Vacancies

Any vacancies that may occur on the Board of Directors by reason of death, resignation, or otherwise, may be filled by appointment of the President and confirmed by a majority of the Board of Directors. Appointed members of the

Board shall serve the remainder of the unexpired term of the position on the Board for which they are appointed.

Voting

Any decision of the Board of Directors shall be a majority vote of the Directors voting, provided that a quorum participates in the vote.

ARTICLE VII - OFFICERS

Officers

The Officers of the Association shall be regular members and shall consist of a President, Vice President, a Secretary, a Treasurer, and other such Officers as may be elected in accordance with the provisions of this Article.

Election and Term of Office

The Officers of the Association shall be elected annually by the members at the August meeting of the members. If the election of Officers shall not be held at such meeting, such election shall be held as soon thereafter as is convenient. New offices may be filled at any meeting of the members. Each Officer shall hold the office until the end of the Chapter year.

Removal

Any Officer elected or appointed by the members may be removed by the members whenever, in their judgment, the best interests of the Association would be served thereby. However, such removal shall be without prejudice to the contract rights, if any, of the Officer so removed. Removal of any Officer, with or without cause, shall be immediately effective upon presentation of a petition demanding such removal at any regular or special meeting of the members.

Such petition shall contain not less than 50% of the current regular members of the Association. Any Officer absent from three consecutive meetings of members or three consecutive meetings of Officers without good cause shall, upon majority vote of the Board of Directors, be removed from office and so notified by the Board.

Vacancies

A vacancy in any office because of death, resignation, disqualification, or otherwise, may be filled by the Board of Directors for the remaining portion of the term.

PRESIDENT

The President must be an active PAYO member in good standing and have served at least one year on the Board of Directors.

Responsibilities:

- Preside over meetings.
- Be a member, ex officio, of all committees.
- Coordinate the establishment of goals for the Chapter each year.
- Provide leadership to the Chapter.

VICE PRESIDENT

The Vice President must be an active PAYO member in good standing and shall be Immediate Past President.

Responsibilities:

- In the event that the President becomes unable to finish the term for which he/she is currently serving, accept position of President and finish the current presidential term.
- Preside over meetings in the absence of the President.
- Coordinate annual election process.
- Coordinate social events.

SECRETARY

The Secretary must be an active PAYO member in good standing.

Responsibilities:

- Take minutes of each meeting and prepare hard copy for next meeting.
- Prepare and distribute Chapter announcements and/or newsletters and correspondence.
- Preside over meetings in the absence of the President and Vice President.

TREASURER

The Treasurer must be an active PAYO member in good standing.

Responsibilities:

- Maintain accurate checkbook.
- Disburse all Chapter funds and collect dues.
- Report financial status of Chapter at each meeting and prepare annual report for September meeting.
- Prepare annual budget.

ARTICLE VIII - CONTRACTS, CHECKS, DEPOSITS, AND FUNDS

Contracts

The Board of Directors may authorize any Officer(s) or agent(s) of the Association, in addition to the Officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Association. Such authority may be general or confined to specific instances.

Checks and Drafts

All checks, drafts, or orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the Association shall be signed by such Officer(s) or agent(s) of the Association and in such a manner as shall from time to time be determined by resolution of the Board of Directors. In the absence of such determination by the Board of Directors, such instruments shall be signed by the Treasurer and/or Assistant Treasurer and countersigned by the President or Vice President of the Association. All checks issued in an amount greater than \$500 must be authorized by the President or Vice President. Any checks issued directly to the Treasurer must be authorized by the President or Vice President.

Budget

A budget shall be compiled by the Treasurer and presented to the Board of Directors.

After the Board has approved the Treasurer's recommendations, the Budget for the upcoming year shall be presented to the membership at the October meeting and voted on by the active membership.

Deposits

All funds of the Association shall be deposited from time to time to the credit of the Association in such banks, trust companies, or other depositories as the Board of Directors may select. An annual report of all receipts and expenditures shall be presented at the November meeting and be made a part of the minutes of this Association.

Gifts

The Board of Directors may accept on behalf of the Association any contribution, gift, bequest, or devise for the general or special purpose of the Association.

ARTICLE IX - AMENDMENTS

These Bylaws may be amended by a two-thirds vote at any meeting of the Chapter.

ARTICLE X - CODE OF ETHICS

1. To be mindful of the personal aspect of the payroll relationship between employer and employee and to ensure that harmony is maintained through constant concern for the Payroll Professional's fellow employees.
2. To strive for perfect compliance, accuracy and timeliness of all payroll activities.
3. To keep abreast of the state of the payroll art with regard to developments in payroll technologies.

4. To be current with legislative developments and actions on the part of regulatory bodies, insofar as they affect payroll.
5. To maintain the absolute confidentiality of payroll within the procedures of the employer.
6. To refrain from using Association activities for one's personal self-interest or financial gain.
7. To take as one's commitment the enhancement of one's professional abilities through the resources of PayrollOrg.
8. To support one's fellow Payroll Professionals, both within and outside one's organization.

ARTICLE XI - DISSOLUTION

The Chapter shall use its funds only to accomplish the objectives and purposes specified in these Bylaws, and no part of said funds shall inure, or be distributed, to the members of the Chapter. On dissolution of the Chapter, any funds remaining shall be distributed to one or more regularly organized and qualified charitable, educational or philanthropic organizations to be selected by the Board of Directors.

Officer Responsibilities

PRESIDENT

Responsibility may include but is not limited to:

- Leads, plans, and oversees all chapter activities to ensure full benefits to all members while protecting the integrity of the purpose of the chapter and the Institute.
- Update the PAYO website chapter profile with the current chapter officer information.
- Verify the PAYO chapter re-affiliation process is complete with new chapter board members and officers.
- Presides over all meetings and conferences.
- Periodically forms working committees that will perform assigned tasks and appoints committee chairs or volunteers when necessary.
- Gives guidance to committees and receives regular activity reports and project updates.
- Acts as an ex officio member of all committees.
- Provides general management and supervision of the affairs of the chapter.
- Performs other duties as may be assigned to the President by the Board of Directors.

This Officer must be an Active member in good standing with PayrollOrg. Guidelines for the New Chapter President Being elected as the President of a local PAYO chapter can bring many rewards and challenges. It is also recognition by your peers of your leadership ability and dedication to the payroll profession.

As the new President, you should ensure that you are familiar with your responsibilities as indicated in the chapter's Bylaws, as well as by gathering

some information about the chapter. Much of this can be obtained by meeting with Past Presidents or by speaking with chapter members who have been active participants over the years. The following are some ideas to help with your transition into this new and exciting role:

- Become familiar with the chapter's budget and Treasurer's report.
- Read the Chapter Affiliation Agreement provided by PAYO National.
- Become familiar with the contact staff at PAYO National for assistance and support.
- Speak with Presidents of other local PAYO chapters; they can often provide insight and ideas for keeping your chapter motivated.
- Make sure you have the name and contact information of your regional advisor from the Board of Advisors. This is an experienced member of PAYO National and can assist you in your new role.

VICE PRESIDENT

Responsibility may include but is not limited to:

- Works directly with the President to ensure that the information provided protects the integrity and intent of the chapter and the Institute.
- Secures speakers for program presentations at meetings and seminars.
- Fulfills/assumes the duties and responsibilities in the event the President is absent or unable to complete the term of office.
- Assists the President with all administrative functions.

This Officer must be an Active member in good standing with PayrollOrg.

SECRETARY

Responsibility may include but is not limited to:

- Works directly with the President to ensure that the information provided protects the integrity and intent of the chapter and the Institute.
- Must keep record of all chapter members, including their PAYO ID# and who is also a PAYO member.
- Attends all meetings of the members and Board of Directors.
- Records minutes, resolutions, votes and any other pertinent issues.
- Ensures that all correspondence, minutes, and records regarding the business of the chapter are duly obtained, maintained and safeguarded.
- Gives proper notice of meetings to members and directors.
- Maintains a membership list.
- Handles all chapter correspondence, including confirmations, thank you notes to speakers and notifications of meetings.
- Orders and maintains current and adequate supplies of stationery, brochures, etc. for availability and convenience of the membership.
- Acts as a center for information, either to relay or gather, by telephone or in written format to the Board of Directors, membership and PAYO National.
- Gathers incoming mail to the chapter and redistributes as necessary.
- Performs other duties as may be prescribed by the Board of Directors.

This Officer must be an Active member in good standing with PayrollOrg.

TREASURER

Responsibility may include but is not limited to:

- Works directly with the President to ensure that the information provided protects the integrity and intent of the chapter and the Institute.
- Sends members confirmation of dues paid.
- Collects dues and other receivables of the chapter.
- Reviews and pays bills of the chapter.
- Maintains records of the financial activity of the chapter.
- Submits monthly financial reports to the President.
- Assists and prepares proposals and cost estimates for programs and activities for the chapter.
- Safeguards and maintains the permanent records of the chapter.
- Submits regular reports of activities and project status to the President.

This Officer must be an Active member in good standing with PayrollOrg.

GOVERNMENT LIAISON OFFICER

Responsibility may include but is not limited to:

- Works directly with the President to ensure that the information provided protects the integrity and intent of the chapter and the Institute.
- Answers questions from the membership (verbal or written) within the limits of the Officer's job when it concerns government relations.
- Represents the chapter to government agencies on local, state and federal levels.
- Provides up-to-date information on new tax laws, revisions and reporting modifications to the membership.
- Submits regular reports of activities and project status to the President.

In order to meet these responsibilities, the GLO should maintain resources of information at government levels. These resources would include, but are not limited to, the PAYO Government Liaison; federal, state and local legislative changes; publications; and newsletters.

This Officer must be an Active member in good standing with PayrollOrg.

NATIONAL PAYROLL WEEK CAMPAIGN MANAGER

The individual appointed to this position is responsible for organizing the chapter's NPW activities and is the principle liaison with PAYO National for all NPW-related communications. Getting all chapter members motivated to participate actively in NPW is a top priority.

Responsibility may include but is not limited to:

- Relays information to chapter members about NPW contests and programs sponsored by PAYO National.
- Updates PAYO National of chapter activities prior to and after NPW.
- Coordinates the chapter's entry in the NPW contests.
- Forms a committee to establish the chapter's plans for NPW, which may include:
 - Efforts to obtain local NPW proclamations
 - Chapter celebrations
 - Media outreach
 - Outreach to community and charity organizations
 - Educational outreach involving local schools and libraries

Instructions for Completing the Application for PayrollOrg Affiliation

1. Carefully read the entire PAYO Chapter Policy Statement as well as the Application for Affiliation.
2. Complete Section (5) of the application. The two people listed here must be members of PAYO National.
3. Complete Section (6) of the application. As a newly forming chapter, you will not have elected your first set of Officers yet. (We do not recommend electing Officers until the chapter has met several times and people have the chance to get to know each other.) Complete this section with the names of people who will be serving as "interim" Officers. Keep in mind that all Officers of an affiliated chapter must be members in good standing of PAYO National.
4. Complete Section (8) of the application. Without the appropriate signatures, the application cannot be accepted.
5. Compile and submit the following pieces of information with your completed Application for PAYO Affiliation: (1) A "membership" roster that lists those people who responded favorably to your questionnaire, and (2) A schedule of your next meeting(s).*
6. If you have any questions or concerns about the Application, please contact Yasmelin Flores, PAYO's Chapter Relations Manager at (210) 226-4600, ext. 2238 or email yflores@payroll.org.
7. Submit the completed Application for PAYO Affiliation by email to ChapterRelations@payroll.org or mail to:

**Chapter Relations Department
PayrollOrg
660 North Main Avenue, Suite 100
San Antonio, Texas 78205-1217**

You will be notified by email regarding the results of the application review process.

*Chapters based outside the U.S. must obtain the consents required to transmit member information to PAYO.

American Payroll Institute, Inc. Policy Statement Regarding Chapter Affiliation Adopted June 25, 1986

Section 1 – Chapters

A local group of members of the Institute consisting of two dues-paying members of the Institute in good standing (referred to in this Policy Statement as a “Payroll Group”) may be declared an Affiliated Chapter of the Institute by approval of the Board of Directors or the Executive Director. Before such approval is granted, it shall be determined that the Payroll Group satisfies the criteria set forth in this Policy Statement. An Affiliated Chapter shall be entitled to use the Institutes’s name and logo for activities authorized under its Articles of Association, or other documents of organization approved by the Institute, and consistent with the criteria described in this Policy Statement; provided that such use shall be accompanied by a clear indication that the activity is that of the Affiliated Chapter and not of the Institute.

Section 2 – Applications

A Payroll Group requesting affiliation shall submit to the Board of Directors of the Executive Director a written application for affiliation on a form provided by the Institute. The application will be consistent with the terms of this Policy Statement.

Section 3 – Membership

An Affiliated Chapter may offer the two classes of membership described in this Section but no other classes of membership. Only individuals will be eligible for membership. One such membership shall be referred to as a Regular Membership. The other membership shall be referred to as an Associate Membership. All Regular Members must be members of the Institute. Only a Regular Member will be eligible to act as an Officer of the Affiliated Chapter. A person who is not a member of the Institute may become an Associate Member of an Affiliated Chapter only by invitation of a Regular Member of such Affiliated Chapter. An Associate Member may not renew his/her Associate Membership without sponsorship of a Regular Member. All members, whether Regular or Associate, will be expected to share their knowledge and experiences and to make a positive contribution to the Affiliated Chapter and to the payroll discipline.

Section 4 – Documents of Organization

If the Payroll Group or the Chapter represented by the Payroll Group formally adopts documents of organization (such as a Certificate of Incorporation and Bylaws or Articles of Association), copies of such documents shall be mailed to the Institute promptly thereafter. Samples of such documents that are acceptable to the Institute will be supplied to the Chapters upon request.

Section 5 – Yearly Plan

The Institute will submit no later than October 1 of each year, to each Affiliated Chapter, a calendar of events scheduled for the next succeeding calendar year. Each Affiliated Chapter must agree in writing as part of its application (1) not to schedule its events and activities in conflict with the Institutes's events and activities, (2) to submit a schedule of its events and activities to the Institute, and (3) agree to abide by all rules and regulations outlined in the current Local Chapter Guide, available at payroll.org. Any planned event of an Affiliated Chapter, which is in conflict with any planned event of the Institute, must defer to the plan of the Institute. The Institute will determine, in its sole role, whether a conflict exists.

Section 6 – Eligibility

A Payroll Group or Chapter shall not be considered for Affiliated Chapter status unless, at the time the application for affiliated status is filed, at least 51% of its members are dues paying members of the Institute in good standing. Chapters that do not have 51% of their members as dues paying members of the Institute at the time of affiliation or re-affiliation must actively work with PAYO's Chapter Relations department to raise their percentage of membership. In extreme cases, Chapters that do not meet the minimum required membership level may lose their charter. In circumstances where a Chapter does not meet the minimum eligibility requirements for two consecutive re-affiliation periods, the Board of Directors or the Executive Director of the Institute shall consider each application for status as an Affiliated Chapter and shall conduct such further examination as it may deem necessary to determine the eligibility of such applicant Payroll Group for such status.

Section 7 – Term of Affiliation and Renewal

The term of an Affiliated Chapter's affiliation shall be one year from the effective date of affiliation. The Institute shall have complete discretion to determine whether or not re-affiliation shall be allowed to occur. If deficiencies are found within an Affiliated Chapter's affiliation or re-affiliation application, that Chapter will be granted a reasonable time period to cure such deficiencies and will be advised of the deficiencies and deadlines to cure, in writing, within 90 days of application receipt by the Institute. Nothing in this Section shall be interpreted as restricting the Institutes's right under Section 8 to effect the disaffiliation of any Affiliated Chapter.

Section 8 – Disaffiliation

The Board of Directors or the Executive Director of the Institute may withdraw the affiliation of an Affiliated Chapter if (1) the activities of such Affiliated Chapter are not authorized in its Articles of Association or other documents of organization, if any; (2) the activities of such Affiliated Chapter are inconsistent with this Policy Statement; or (3) such Affiliated Chapter's Regular Members comprise less than 51% of its total membership for more than 90 days. A preliminary determination of disaffiliation on the foregoing grounds shall be made by the Executive Director of the Institute, of which determination shall be final if not appealed from by the disaffiliated Chapter within 15 days after the disaffiliated Chapter receives notice of such preliminary determination. The disaffiliated Chapter may appeal from such preliminary determination by delivering written notice of such appeal to any Director of the

Institute. The appeal shall be considered by a special panel consisting of one person appointed by the Board of Directors of the Institute, one person appointed by the disaffiliated Chapter and one person appointed by the first two panel members so appointed. The determination of disaffiliation shall become final upon majority vote of the special panel. Such determination shall be subject to judicial review only for the purpose of determining whether the special panel's determination was made arbitrarily, capriciously or fraudulently. Any Affiliated Chapter whose roll of Regular Members falls below two for a 12 month period shall automatically be disaffiliated without any right to appeal. At the time disaffiliation becomes final by vote of the special panel, the disaffiliated Chapter shall no longer be entitled to use the Institutes's name and logo for any purpose.

Section 9 – Autonomy

Except as otherwise provided in this Policy Statement, an Affiliated Chapter shall have complete autonomy with regard to all phases of its operation including adoption of its Articles of Association or other documents of organization.

Section 10 – Officers

All Officers of an Affiliated Chapter must be currently enrolled as members of the Institute and, if applicable, be dues paying participants of the Affiliated Chapter.

Section 11 – Relationship

No Affiliated Chapter shall be deemed to be an agency or instrumentality of the Institute or another Affiliated Chapter, nor shall the Institute be deemed to be an agency or instrumentality of any Affiliated Chapter. The Institute shall not be liable in any way for the debts or actions of any Affiliated Chapter, nor shall the Affiliated Chapters individually or collectively be responsible for the debts or actions of the Institute.

Section 12 – Guests at Meetings, Programs, and Seminars

Guests of any member of an Affiliated Chapter shall be permitted to attend Affiliated Chapter meetings without charge; provided, however, that, except as specifically provided below, each such guest may attend no more than two such meetings in a calendar year and no member of an Affiliated Chapter may invite more than two guests at a time. All employees of a host employer for any Affiliated Chapter meeting, program or seminar shall be entitled to attend such meeting, program or seminar without charge. A representative of a member chosen by the member to attend a meeting, program or seminar in the place of the member will not be considered a guest for the purposes of this Section. Whenever admission is charged for a meeting of an Affiliated Chapter, program or seminar, the admission fee applicable to Associate Members of the Affiliated Chapter and nonmembers shall be no less than 120% of the admission fee applicable to Regular Members. For the purposes of this section, the term "meeting" shall refer only to regularly scheduled meetings of the Affiliated Chapter for which no admission fee is charged and shall not include specially scheduled meetings, programs, or seminars offered by any Affiliated Chapter or the Institute.

Section 13 – Goals of Affiliation: General Principles

The goal of the Institute in granting affiliation is to encourage the formation of local groups having the payroll discipline as a common primary interest. The Institute intends that such local groups will provide assistance in the Institutes's efforts to communicate with, educate and provide related services to individuals interested in the payroll discipline. Accordingly, the Affiliated Chapter will conduct its activities in a manner that will complement the Institutes's efforts and encourage membership in the Institute and participation in the Institutes's activities. The goals of each Affiliated Chapter will vary from time to time and from Chapter to Chapter. The Institute recognizes the necessity for autonomy and independence at the Chapter level so that each local Chapter will be able to respond to the various and changing needs of each Chapter's members. Accordingly, subject to the condition that Affiliated Chapter activities and policies must not endanger the likelihood of success of the Institutes's activities and achievement of the Institutes's goals, the Institute intends to encourage Affiliated Chapter autonomy, independence and strength.

CHAPTER NAME: _____

CONTACT NAME: _____

COMPANY NAME: _____

ADDRESS: _____

PHONE: (____) _____ FAX: (____) _____

EMAIL: _____

THE MAIL LIST REQUEST WILL BE USED FOR:

- ☐ Chapter (to gain new members)
- ☐ Statewide
- ☐ Other, Explain: _____

YOU WILL RECEIVE:

- 1 Excel sheet with PAYO Members' email address
- 1 Excel sheet with PAYO Members' physical mailing address

PLEASE PROVIDE: CITIES, STATES OR ZIP CODE

*PLEASE INCLUDE A SAMPLE OF YOUR EMAIL OR FLYER WITH THIS FORM

Submit completed form to ChapterRelations@payroll.org or fax to (210) 224-6038.

Allow 10 business days to receive your PAYO membership list.

For Chapter Relations use only:

Requested _____ Created _____ Emailed _____ Initials _____

PayrollOrg's – List Trade Agreement

We acknowledge that the names and addresses on these lists are the unique and valuable property of PayrollOrg. As such, these lists will be received by us and held in the strictest confidence. We agree that all the names and addresses on these lists remain the sole property of PayrollOrg. We understand that these lists are provided to us for ONE TIME USE ONLY; any further reuse of these lists must be requested from PayrollOrg in writing. We agree not to rent or re-sell these names and addresses to any other company or individual. We agree that they will not be "merged" with any other lists or data bases for any purpose other than the ONE TIME USE MAILING. Such use in our computers will be for the sole purpose of preparing the actual "mail merge" or for printing the labels associated with the ONE TIME MAILING.

We agree not to add telephone numbers to the list, nor use it for telephone solicitations. We understand that PayrollOrg has seeded the list with company names and addresses whose telephone numbers are publicly available through directory assistance.

After PayrollOrg has sent the lists to us, we understand that we shall be held unconditionally responsible therefore, and for any costs incidental to litigation, including PayrollOrg's reasonable attorney fees, which may occur should the conditions of this agreement be violated. We acknowledge that the list is the confidential and trade secret property of PayrollOrg, and any violation of the agreement will entitle PayrollOrg to injunctive relief, as well as damages outlined above. We understand and agree to take all necessary steps to prevent release or disclosure of the list or its origination to any third party, including individuals, associations, firms, and parent or subsidiary organizations, unless such disclosure shall have been authorized in writing by PayrollOrg.

PayrollOrg disclaims all warranties as to the list, including the implied warranties of merchantability or fitness for a particular purpose. In no such case will PayrollOrg be liable for any direct or indirect damages resulting from use of the list whether or not such damages are related to errors or other defects in the list. This agreement is binding regardless of whether we use the list provided by PayrollOrg.

All lists provided by PayrollOrg shall be used within 30 days.

This agreement shall apply in its entirety to all subsequent list uses made by us from PayrollOrg. By signing, I acknowledge that I am an authorized representative of the above company, and am authorized by my company to execute this agreement.

By signing the below you have read and agree to the responsibilities listed in the Agreement above.

Signature of Authorized Representative

Date

Print Name of Authorized Representative

Chapter Name

The undersigned, acting on behalf of the

Name of Chapter: _____

City, State, Zip Code: _____

(Herein referred to as the "Chapter") do hereby submit our application for affiliation with the American Payroll Institute, Inc. (Herein referred to as the "Institute"). In making this application, we, individually, collectively and on behalf of the Chapter as its authorized agents, make the following representations with the intention of inducing the Institute to grant Affiliated Chapter status.

- (1) We have reviewed the American Payroll Institute, Inc. Policy Statement Regarding Chapter Affiliation adopted by the Institutes's Board of Directors on June 25, 1986; we understand the conditions described in such statement that the Chapter must satisfy in order to obtain Affiliated Chapter status; and we agree to formulate our policies and conduct our activities in a manner that will satisfy such conditions.
- (2) At least 51% of the Chapter's current members are also dues paying members in good standing in the Institute and the list of the Chapter's members that is attached is current as of the date of this application.
- (3) The Chapter's independent activities and transactions (including use of the Institutes's name and logo) will be undertaken so that others will not confuse the Chapter's activities with the activities of the Institute. The Chapter will transact its business using the sample stationery that is attached, or stationery with letterhead that is substantially identical to the sample attached, containing a phrase similar to:

"The (name of chapter) is affiliated with the American Payroll Institute, Inc. (dba PayrollOrg) but is an autonomous and independent organization. American Payroll Institute, Inc. is not responsible for the liabilities, statements, or activities of any of its affiliated chapters."

- (4) We understand that sample documents of organization that are acceptable to the Institute are available. We understand that the Institute, by providing such samples, is not engaged in rendering legal, accounting or other professional advice; rather, the sample documents and other materials provided to us by the Institute are intended only as reference materials, not as a substitute for professional advice. Accordingly, we agree to hold the Institute, its Officers, and employees harmless as to the contents of, and any omissions from, any such samples and other materials.

- (5) The names, addresses, and telephone numbers of the two individuals who are dues paying members in good standing of the Institute and who comprise the Payroll Group (as defined in the Policy Statement) are listed below.

(A) Member #1: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

(B) Member #2: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

- (6) The Officers of the Chapter are all members of the Institute. Their names, addresses and telephone numbers are listed below.

(A) President: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

(B) Secretary: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

(C) Treasurer: _____ PAYO ID#: _____
Employer's Name: _____
Employer's Address: _____
Telephone: (_____) _____ Fax: (_____) _____
Email: _____

- (7) Any change in any document of organization or in the stationery of the Chapter will be submitted to the Institute for review.
- (8) By signing this document, we are certifying that we are authorized to make the foregoing representations and apply for Affiliated Chapter status.

Signatures:

President

Date

Secretary

Date

Treasurer

Date

Member #1

Date

Member #2

Date

The undersigned, acting on behalf of the

Name of Chapter: _____
(if you are reporting a name change, provide both the current and former name of the chapter)

City, State, Zip Code: _____

(Herein referred to as the "Chapter") do hereby submit our application for re-affiliation with the American Payroll Institute, Inc. (Herein referred to as the "Institute"). In making this application, we, individually, collectively and on behalf of the Chapter as its authorized agents, make the following representations with the intention of inducing the Institute to grant Affiliated Chapter status.

- (1) For chapters that are reporting a name change. You certify that the chapter has completed the legal process to change the chapter's name, including applicable requirements in the chapter's origination documents (e.g., articles of incorporation) and bylaws.

 Initial

- (2) At least 51% of the Chapter's current members are also dues paying members in good standing in the Institute. The undersigned certify that the list of Chapter members submitted with this application is current as of the date of this application. Failure to submit the list with the yearly affiliation agreement may result in restrictions being placed on the chapter by PAYO including, in extreme cases, denial of charter renewal. The current list of all chapter members should be submitted in a spreadsheet or Excel document containing the following fields:

 Initial

- | | | |
|--|-----------|---|
| ▪ PAYO National ID#
(if applicable) | ▪ Address | ▪ Phone |
| ▪ First Name | ▪ City | ▪ Fax |
| ▪ Last Name | ▪ State | ▪ Email |
| ▪ Company Name | ▪ Zip | ▪ Date Local Chapter
Officer Terms End
(one year) |
| ▪ Company Title | ▪ Country | |

- (3) The Chapter's independent activities and transactions (including use of the Institutes's name and logo) will be undertaken so that others will not confuse the Chapter's activities with the activities of the Institute. The Chapter will transact its business using the sample stationery that is attached, or stationery with letterhead that is substantially identical to the sample attached, containing a phrase similar to:

"The (name of chapter) is affiliated with the American Payroll Institute, Inc. (dba PayrollOrg) but is an autonomous and independent organization. American Payroll Institute, Inc. is not responsible for the liabilities, statements, or activities of any of its affiliated chapters."

Initial

- (4) We understand that sample documents of organization that are acceptable to the Institute are available. We understand that the Institute, by providing such samples, is not engaged in rendering legal, accounting or other professional advice; rather, the sample documents and other materials provided to us by the Institute are intended only as reference materials, not as a substitute for professional advice. Accordingly, we agree to hold the Institute, its Officers, and employees harmless as to the contents of, and any omissions from, any such samples and other materials.

Initial

- (5) The Officers of the Chapter are all members of the Institute. Their Profile information is listed below.

(A) President: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

(B) Secretary: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

(C) Treasurer: _____ PAYO ID#: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

- (6) Chapter officers and leaders have reviewed and agree to abide by PAYO's Local Chapter Guide.

Initial

- (7) Any change in any document of organization or in the stationery of the Chapter will be submitted to the Institute for review.

Initial

- (8) By signing this document, we are certifying that we are authorized to make the foregoing representations and apply for Affiliated Chapter status.

Initial

- (9) Indicate all chapter officers, board members, committee heads or leaders of the chapter in the 'Additional Chapter Officers, Board Members and Leaders of the Chapter' section to provide a complete list of all person in charge for the chapter. Either elected or appointed by the chapter.

Initial

Signatures:

President

Date

Secretary

Date

Treasurer

Date



Additional Chapter Officers, Board Members & Leaders of the Chapter

START TERM DATE: _____ **END TERM DATE:** _____

Chapter Officer Title: _____ PAYO ID#: _____

Name: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

Chapter Officer Title: _____ PAYO ID#: _____

Name: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____

Chapter Officer Title: _____ PAYO ID#: _____

Name: _____

Employer's Name: _____

Employer's Address: _____

Telephone: (_____) _____ Fax: (_____) _____

Email: _____