

## APRA HQ AND CHAPTER RELATIONSHIP CHECKLIST

### FIRST QUARTER: JANUARY-MARCH

- Governance**
  - Alert Apra HQ if your [Employer Identification Number](#) (EIN) has changed
  - Alert Apra HQ if changes have been made to your [Articles of Incorporation](#)
  - Alert Apra HQ if changes have been made to your [bylaws](#)
  - Alert Apra HQ to request a [name change](#) if operating under an alternate name
- Annual Rosters**
  - \*Send Chapter membership roster to Apra HQ, confirming at least 10 active Chapter members
  - Alert Apra HQ if changes have been made to your board roster
- Financials**
  - \*Confirm fiscal year is consistent with Apra HQ (January 1<sup>st</sup> - December 31<sup>st</sup>)
  - \*Confirm maintenance of a local bank account that is:
    1. Registered in the name of the Chapter and under the Chapter's tax identification number
    2. Repository for Chapter funds (staff/volunteer personal accounts unacceptable)
- Chapter Operations**
  - Alert Apra HQ if you and/or your board members need to be added to the [Chapter Leaders Community](#)
  - Alert Apra HQ if interested in purchasing a shared Chapter Zoom license – Details to Follow
  - Consider [submitting at least 2 events](#) throughout the year to Apra HQ for posting on the Apra website

### SECOND QUARTER: APRIL-JUNE

- Annual Rosters**
  - Alert Apra HQ if any changes have been made to your board roster
- Financials**
  - \*Participate in the [Group 990n tax return filing](#) prepared by Apra HQ by submitting 990 tax organizing documents to Apra HQ by May 1<sup>st</sup> – Details to Follow
- Chapter Operations**
  - \*Send at least 1 Chapter representative to attend [Chapter Summit](#)
  - Consider [submitting at least 2 events](#) throughout the year to Apra HQ for posting on the Apra website

### THIRD QUARTER: JULY-SEPTEMBER

- Annual Rosters**
  - Alert Apra HQ if any changes have been made to your board roster
- Chapter Operations**
  - Consider [submitting at least 2 events](#) throughout the year to Apra HQ for posting on the Apra website

### FOURTH QUARTER: OCTOBER-DECEMBER

- Annual Rosters**
  - \*Submit Chapter board slate to Apra HQ prior to a Chapter board or membership vote to verify if:
    1. Minimum of 3 members are active Apra International members
    2. Minimum of 2+ organizations/institutions are represented on the board slate
    3. Number of officers/directors that are active Apra members support the Chapter bylaws
  - \*Submit your voted and ratified [board roster](#) to Apra HQ
- Chapter Operations**
  - Consider [submitting at least 2 events](#) throughout the year to Apra HQ for posting on the Apra website

### AT TIME OF ANNUAL FILING

- \*Send [materials](#) for filing Illinois Secretary of State annual report to Apra HQ:
  1. Current Board Roster
  2. Mission Statement
  3. Email Approval by President of Filing by Apra HQ on Behalf of Chapter
- Verify if your local Secretary of State requires a Certificate of Authority to conduct business in addition to your Chapter filing in Illinois, and if required, send certificate to Apra HQ

\* Required