How-to Guide for

Forming a Chapter

of the

American Academy of Optometry

Based upon the experience of the Arizona Chapter (2013)

Step 1: Petition AAO Board of Directors to form a Chapter

Send a cover letter, Chapter Bylaws, Signature Page & $100 fee.

* Sample Cover Letter to AAO Board of Directors requesting formation of chapter



* Sample Chapter Bylaws

*(The AAO office provided this word document that we had to fill in blanks with our state.)*

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* Signature Petition
  + Need 10 Fellows of the Academy in your state/region to sign petition
* $100 Fee
* Send to: Helen Viksnins, Vice President, Education and Professional Relations

American Academy of Optometry, 622 East Washington Street, Suite 300, Orlando, FL 32801

Wait for Board approval

Step 2: Establish the Business Aspects of the Chapter

Determine the address to be used by the Chapter

* PO Box vs. Optometry School or College in your state/region
* We opted to use the Arizona College of Optometry address, ATTN: FAAO Faculty Liaison

Set up an email address for the Chapter

* We chose to use gmail
* All of the officers have the password; the secretary-treasurer has the responsibility of regularly checking the inbox

Register the non-profit organization with your state

* You will need this to establish a bank account without being personally responsible for the account. In the end, you will obtain “Articles of Incorporation” that the bank will need to open an account for the organization without using your personal social security number.
* We followed the instructions provided at: <http://www.nolo.com/legal-encyclopedia/form-nonprofit-501c3-corporation-30228.html>

Apply for a Federal EIN for the organization (tax ID number)

* <http://www.irs.gov/Charities-&-Non-Profits/Employer-Identification-Number>

 

If desired, file for tax exempt status with the IRS (Form 1023)

* We have not done this
* The North Carolina chapter is an official 501(c)(3)

Apply for a bank account

* We searched location of the major banks in our state and selected based upon which was most readily accessible in the remote/rural areas of our state.
* You will need to have 2 people open the account so there are 2 authorizing signatures: the anticipated President and Secretary-Treasurer.

Decide if you would like to set up a PayPal account or similar for the Chapter

* We chose to open a PayPal account so that we can accept credit and debit card payments online
* We also chose to open a PayPal Here account so that we may accept credit and debit card payments at our meeting(s). This requires a card reader and app on an Apple or Android device. There are other apps available (i.e. – Square readers) that can do the same thing. We opted to stick with PayPal Here since we would already have a PayPal account.

Step 3: Plan your Inaugural Chapter Meeting

Select a Meeting Date

* Arizona is a large state with Fellows living throughout; therefore, we selected a Saturday so that more ODs would have the opportunity to attend. In Illinois, the meetings are held on weeknights in Chicago with 2-hours of CE offered. The New Jersey Chapter has a large weekend CE event where approximately 14 CE hours can be earned.
* Avoid the same date of other CE offerings in your state/region

Venue

* We selected a central location in our state, which also happens to be the location of the Arizona College of Optometry which is allowing the Chapter to use one of its lecture halls free of charge

Speakers / CE format

* The AAO Cornea, Contact Lens, and Refractive Technologies Section has a Speaker’s Bureau available for Chapters. You may have a Diplomate of their Section speak at no charge. Contact: Kelvin Tang, OD, FAAO, 925-938-2020 (p), [kelvintang.od@gmail.com](mailto:kelvintang.od@gmail.com)
* We chose to hand-select speakers for our first meeting which will be a Grand Rounds format rather than traditional 1- or 2-hour CE lectures

Do you want to obtain COPE-Approval?

* The Arizona Board of Optometry to beginning to require COPE-approved CE; therefore, we chose to obtain COPE-approval for the meeting
* ARBO administrator information is COPE-approval is available at [www.arbo.org](http://www.arbo.org)

Should you charge a fee for the meeting?

* Membership Dues vs. Paid Meeting vs. Corporate Sponsorship
  + We chose to charge annual dues for membership in the Chapter and all Chapter CE events are free with paid dues
  + The North Carolina Chapter does not charge dues to its members, but rather adds up the costs associated with each meeting and charges the approximate cost per member for attendance. In the past, they have had corporate sponsorship (Alcon) for their meeting.
* Non-member attendance
  + For ODs in the state who are not Fellows of the Academy who would like to attend the Chapter meeting, we charged a non-member fee (equivalent to the cost of annual dues for our members)

Step 4: Announce establishment of the Chapter and its Inaugural Meeting

Obtain a list of all of the Fellows in your state from the AAO office

* Request from Kayla Ritten (KaylaR@aaoptom.org)
* Add all Fellows to your Chapter’s email contact list

Write an announcement letter/email

* We sent an email to all prospective members with an email address and a letter to those without an email address to save money in the cost of postage



Prepare a meeting brochure

* We used Microsoft Publisher and saved as a PDF to email as an attachment

 