



National Kidney Foundation[®]

January 2011

Introduction

Effective January 2011, the NKF has established new policies and procedures to better serve its local chapters of the Council on Renal Nutrition (CRN), Council of Nephrology Social Workers (CNSW), and Council of Nephrology Nurses & Technicians (CNNT). With the transition of NKF affiliates into divisions of the national organization, we have the opportunity to strengthen our partnerships with our local professional groups. To do this efficiently and effectively, there is a need for greater involvement with and oversight of the local chapters by the NKF National Headquarters (HQ). Our intention is to create more structure, and increase support and collaboration as we work toward our common goal of improving the care and health of kidney patients.

A local chapter resources website has been established to detail the policies and assist chapters in operations, Visit www.kidney.org/professionals/LocalChapterResources, referred to throughout this memo.

Background

NKF is currently undergoing a transition from the affiliate model to the division model. Bringing NKF closer to a single corporate structure enables HQ to consolidate many operational functions, develop and maintain a strong national brand, and accelerate program and fundraising growth throughout the U.S. NKF division employees are treated as employees of HQ. Some NKF affiliates have chosen to remain affiliated instead of becoming a division. NKF affiliates are designated by "NKF of [Location]," whereas NKF divisions are now referred to as "NKF Serving [Location]."

CNSW, CRN, and CNNT, whose membership and chapters are represented by Executive Committee, are professional councils of the National Kidney Foundation (NKF), and serve in an advisory capacity to the Foundation. The Membership Services Department of the NKF HQ grants charters and processes affiliation applications for local chapters.

A survey of NKF-CNSW and NKF-CRN Chapter Chairs was conducted in the spring of 2009. Survey results provided a better understanding of how chapters are structured and what services they offer to their members. The results showed that local chapters have been very successful in providing educational programs for professionals, educational materials for patients, financial support for patients, and supporting local NKF initiatives. Local chapters differ in membership size, frequency of meetings and operational structure. Some charge dues, others do not. Some have recurring educational programs that they plan in conjunction with the NKF division or affiliate in their area, and others plan programs independently.

There are many opportunities for collaboration between the NKF divisions and affiliates and the local chapters, and HQ has many resources to offer them as well. Policies have been developed to provide guidance to local chapters, both financially and legally, and encourage greater collaboration with the NKF. In addition, these highly active and committed volunteers are an existing resource that NKF divisions can

call upon to work in an advisory capacity, volunteer at KEEP screenings and Kidney Walks, and partner with on educational programs.

Role of the NKF Division or Affiliate In Your Area

NKF hopes to connect each local chapter with a nearby division or affiliate office. Geographically, this may be a challenge; however, as stated previously, many groups are already successfully collaborating. It is the goal to have a point-person for local chapter activities at each NKF division or affiliate. For those local chapters where there is no NKF division or affiliate, there may be instances where they will need to work directly with the HQ. Please see the listing of NKF divisions and affiliates, found on the local chapter resources website, for local office contact information.

Possible ways to collaborate with the NKF division or affiliate in your area are outlined in the *Best Practices* section of the website.

Role of the Council Executive Committee Region Representatives

The Council Executive Committees have Region Representatives for each of the five NKF Regions. Region Reps are responsible for maintain triannual contact with the local chapter chairs in their respective regions to discuss leadership changes, upcoming educational programming, and provide any necessary support.

The Region Rep is the Chapter Chair's ongoing point of contact to their Council's Executive Committee and HQ. Chapter Chairs may also contact the Professional Membership Director at HQ for additional support.

Becoming an Affiliated Local Chapter

Upon chartering, and then every other year (CRN in even years, CNSW and CNNT in odd years), local chapters are required to complete a Chapter Affiliation application online, and submit it to the NKF Membership Services Department at HQ, along with a copy of their current membership roster. Please see the *Guidelines for Affiliation*, found on the Local Chapter Resources website, for details.

It is understood that local chapters are representing the NKF. Accordingly, it will be requested every other year on the affiliation application that Chapter Chairs read, affirm, and comply with the policies set forth by NKF.

Chapter Membership vs. National Organization Membership

Affiliated local chapters may maintain their own membership requirements and can charge nominal membership dues. Membership in a local Chapter does not give a person membership in the National Council, or vice-versa. Local chapters should ensure that members are aware of the differences between local membership and national membership dues and benefits. Please contact the NKF Professional Membership Director to obtain materials for your local chapter meeting (these include: membership brochures, booth display materials and information on national programs or resources).

Financial Policies

NKF volunteers, including local chapters, may not use the national NKF's 501(c)3 tax exempt number, or that of an NKF affiliate, for any purpose. The IRS dictates that only authorized officers and key personnel of the NKF may be in possession of and use this number.

Local chapters may charge membership dues, program fees and fundraise for patient assistance, however, the funds will need to be maintained by the NKF division or affiliate in their area. NKF is required by the Internal Revenue Service (IRS) to collect and report all fundraising dollars. A local chapter may not maintain an independent bank account or Federal Tax ID number under any circumstances. In most cases, chapters are not incorporated and are fundraising in the name of the NKF; from an audit and ethical perspective, the funds need to be accounted for by the HQ

The local chapter's funds will be accounted for as a line item within the division or affiliate budget, restricted for chapter use only. Statements will be provided quarterly or upon request to chapter chairs or chapter treasurers. For those local chapters who cannot be geographically matched with an NKF division or affiliate, there may be instances where funds are maintained directly by HQ.

For NKF affiliates only: local chapters who are successfully partnering with an affiliate can continue to use the affiliate's tax ID, per any existing agreement between the groups. However, all fiscal activities need to be recorded in the affiliate's accounting records. If the chapter has a bank account separate from the affiliate, the affiliate must be listed as the owner and signatory on the account, the account must be listed at the affiliate's address and all bank statements are to be reviewed by the affiliate's accounting staff. A reversion of funds provision must cover the account directing funds to the affiliate in the case of dissolution of the local chapter.

Local chapters with bank accounts will need to transfer the funds to an NKF account as soon as possible. Please contact NKF to discuss and plan for the transition.

Planning Local Chapter Meetings

Many local chapters serve as providers of educational services and resources for professionals in the division/affiliate territory. In the past, in order to conduct these activities, many chapters have looked to the NKF affiliate to use the affiliate's tax ID or CME/CE provider number for programming. To maximize consistency and quality assurance of all NKF-supported programs, all accredited educational programming by local chapters must now be approved through HQ.

Applying for Continuing Education Credits

Any educational programming by local chapters for which CME/CE accreditation or industry support is being sought must go through content approval at HQ. Local chapters working on a program with an affiliate can bring it back to the affiliate to accredit, only AFTER content approval by HQ.

All local chapters will be required to follow NKF's CME/CE protocol for approval. The first step is to submit a **Preliminary Planning Form** on the *Local Chapter Resources* website.

An application packet for CEU approval, which is due 60 days prior to hosting the event, includes the following documentation:

- A copy of draft promotional material that will be used to advertise the course

- Faculty and planning committee names and contact information to facilitate the disclosure process
- A list of course objectives and outline
- Draft content
- A copy of the evaluation form
- A copy of a Certificate of Completion for the course

Visit the *Local Chapter Resources* website for a detailed policy, online forms/samples and FAQs.

Grant Requests and Obtaining Corporate Support

All local chapters seeking to receive funding from a corporation, pharmaceutical company, or foundation for any purpose, must submit grant requests through the NKF Corporate Relations Department at the NKF National Headquarters. All requests will be submitted online using a Grant Submission Request Form. The process will be the same, regardless of whether the chapter is working with an NKF division or NKF affiliate. When completing the form, local chapters will need to provide the following items: needs assessment, full program description, educational goals and objectives, preliminary meeting agenda (topics and times), faculty list, disclosure forms and full line item budget. Grant requests and all supporting documents must be submitted 100 days (3.5 months) prior to event date. The applicant will be contacted immediately upon notification of grant acceptance or rejection.

Visit the *Local Chapter Resources* website for a detailed policy and online Grant Request forms.

Using Logos

Local chapters can use the national logo on their websites and materials, and can place their Chapter name below the national logo. In using the logos, local chapters are representing NKF. Local chapters should not have their own logo that differs from the national logo.

Example:



Websites

If desired, the NKF will host webpage(s) for your local chapter. Contact your Region Representative for a form. If your local chapter is currently operating its own website, please be sure to have the web address on file with HQ when submitting the Chapter Affiliation Application every other year.

If you have questions or concerns about any of the policies, please contact:

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