



Chapter Checklist

How to add members to database:

1. Need to be chartered to be able to add members
2. Need to have a chapter president in database
3. Cannot add members as at large members as per Policies: Article 3, Policy 3.1C

Recommendations:

1. Keep a spreadsheet of interest members with email, phone number, Date of Birth and Address

What to do for the IRS:

1. Chapter needs to get an EIN number from the IRS
2. JCI US HQ will take care of the 1040 form under our national umbrella
3. IRS form 8976 is required within 60 days of formation for all organizations started after 2015. Chapters need to do this form themselves. HQ can help.

Recommendations:

1. For address, if no Local President yet, register to the state address and then can be updated

How to get a bank account:

1. Provide EIN and address to bank
2. If no local office, register to state
3. For bank account should have president, secretary on bank account

Insurance

1. Need directors liability insurance
2. Check with your state secretary of state office for other insurance requirements as differs by state.

State Tax ID laws

1. Each state has different Tax ID laws, check with your state secretary of state office



What Is The Charter Fee & How Do I Pay?

- Charter Fee is \$250
- For the 1st 6 months – a new member pays \$15 for their 1st year
- States & Chapters may set their own fees in addition
- JCI USA will help with tax/IRS determination
- JCI USA will do chapter logos for you
- JCI USA will send chapter banner to you
- For help chartering contact Executive Director (exdir@jciusa.org) & Chapter Development Director (nfitzgerald@jciusa.org)

What are the requirements to charter?

- The minimum number of members to charter is 10. These must be new members.
- Within a year, the new chapter should get to 20 members. If after a year, they are not at 20, they will be billed for the missing members between the number they have and 20.
- Eg if they have 14 members, they need to pay for 6.
- We have lots of training on how to recruit and retain members. Ask the JCI USA Membership Director or the Chapter Development Director who can help you!

HELPFUL HINTS TO SPEED PROCESSING

Each member must meet JCI USA age requirements (18-40 inclusive) as of the processing month in which the extension is to be applied. Dates of birth, phone numbers and emails are required.

All members currently listed on The U.S. Junior Chamber membership roster may not be included as one of the first twenty members. This includes members in at-large chapters 8888 and 9999. They may become the 21st charter member of any new chapter.

Full names, rather than initials, must be used on the Charter Member Form.

Use a complete mailing address to ensure that all new members receive their membership cards, publications, and other information.

Signatures of the extension Chairperson and a representing member of the new chapter must be notarized, and daytime phone numbers included for each.

Chapter population divisions should be determined at the state office using the latest U.S. Census figures for the city or town in which the majority of the new members reside.

Region/District Director assignments must be listed exactly as they appear on The U.S. Junior Chamber RD and DD summary, which is sent monthly to the state office.



HOW TO SUBMIT THE PAPERWORK TO BE AN OFFICAL CHAPTER

1. APPLICATION FOR AFFILIATION - Place the new chapter name on the first line of the application for affiliation. Fill in all of the spaces with the required information. The new chapter temporary or elected President must sign the application and include a daytime telephone number.
2. The same information is required from the affiliation Chairperson. These signatures must be notarized. It is important to include both the state number and chapter number along with, if applicable, the founding chapter's name and population division.
3. The bottom portion of the application is to be completed by the State President or state office. This information is used to place your chapter in the proper region and district. The state headquarters has a listing of all Regional and District Directors in the state, and they will assure that the information listed in this portion matches exactly with what is on file with JCI USA.
4. CHARTER MEMBER FORM - This form is used to establish your official membership record on file with JCI USA,
5. Be certain that all of the information listed on this form is complete and correct. If an incorrect address or email is listed, you will not receive national emails or membership cards. All applicants for membership must list a date of birth on this form in order to be accepted for membership, and be between the ages of 18 and 40 inclusive. Remember to use your full name.

Remember!

- Minimum of ten (10) charter members – need to get to twenty (20) over your 1st year
- Charter fee of \$250
- Administrative fee of \$15 per charter member (within 1st 6 months of chartering). After that date standard JCI USA membership fees apply (for amount please check with JCI USA HQ)
- Completed Application for Affiliation
- Completed Charter Member Form listing all charter members