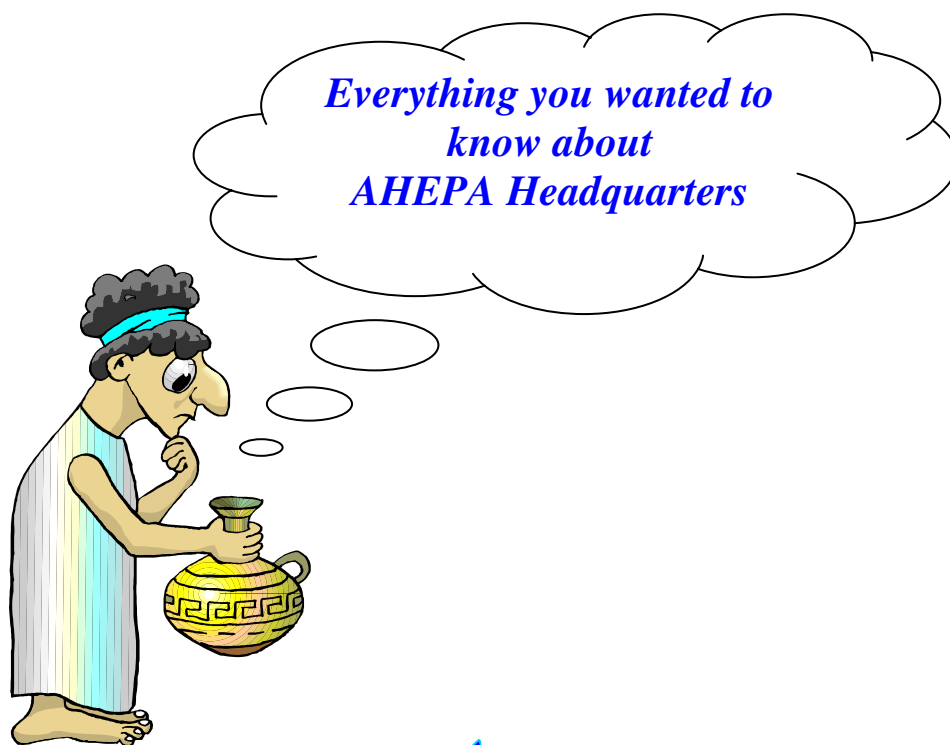


Joe AHEPA's Guide to National Headquarters



Joe's Back!



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INTRODUCTION

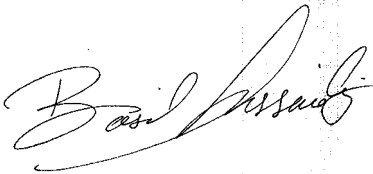
Hello and welcome to the AHEPA Headquarters Handbook!

This guidebook is designed to help every AHEPAN, from the Supreme President to the dues paying member, become familiar with all facets of our National Headquarters.

The mission of this guidebook is to educate each member so that they become more knowledgeable with the workings of Headquarters. Questions about certain procedures such as, "What is the proper way to find out about emergency fund eligibility?" are common.

With this guidebook, the member will have an understanding of the procedure ahead of time and may save himself the cost of a phone call and more importantly, time. The end result will be an efficient and better-educated AHEPA!

Fraternally,

A handwritten signature in cursive script, appearing to read "Basil Mossaidis". The signature is written in black ink and is positioned above the printed name and title.

Basil N. Mossaidis
Executive Director

WHO'S WHO AT AHEPA HEADQUARTERS

Supreme President	Nicholas A. Karacostas, Esq. supremepresident@ahempa.org	
Executive Director	Basil N. Mossaidis Basil@ahempa.org	ext.101
Controller	Patrice Farish Patrice@ahempa.org	ext.103
Director of Membership Services	Rosalind Ofuokwu rofuokwu@ahempa.org	ext.107
Programs Coordinator	Rory Puckerin Rory@ahempa.org	ext.102
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MEMBERSHIP DEVELOPMENT DEPARTMENT

A membership campaign has been design to stimulate and engage the entire base membership in implementing the following membership plan:

Membership Campaign

- Build an infrastructure and provide support to chapters
- Intensive one-on-one relationships with local chapter officers
- Identifying best practices on the chapter level
- Establishment of a national volunteer network to gather and enter names for data-entry
- Creation of a nationwide membership contest on the local, district and national levels
- Establish membership workshops and
- Define a membership package

AHEPA's online membership recruitment program now makes it easier for qualified candidates to join a local chapter or automatically sign up as an "AHEPA National Member" by visiting www.ahepa.org or www.ahepaonline.com.

The objective of the online membership program was set-up as a gateway for national membership.

Online Membership Campaign

- Make it easy for people to sign up and donate on the web;
- To be able to use credit cards;
- To provide a gift membership;
- To recommend other potential members;
- Offer a national member online newsletter profiling new members;
- Online chapter news and,
- Invitation to be sent to other potential members

Frequently asked questions about Membership Development

Q. What's a "AHEPA National Member"?

A. As a "AHEPA National Member" potential candidates can join the AHEPA online as a national at-large member. This new membership program makes it easy to join quickly and easily using credit cards with our interactive online registration system. Or, if it's easier, candidates can print out a simple registration form and mail it back or fax it back to AHEPA along with a registration fee.

Q. Can potential candidates join a local chapter on-line?

A. Yes. Qualified candidates interested in joining a local chapter can directly contact a local chapter online for information on their chapter's application and initiation process—or they can download an application to join the Order of AHEPA and send it to a local chapter for approval.

Q. Does a "AHEPA National Member" have voting privileges?

A. No. Members of the "AHEPA National Member" category are considered members at-large and thus are not directly attached to a chapter. They do not have to take an oath, and they have no voting privileges. They cannot be elected to any office, nor be a delegate to either a district or supreme convention. Although they cannot serve as delegates to conventions, they are encouraged to attend conventions and participate in social, educational and social events. However, "AHEPA National Member" members do received a membership card and basic membership benefits and privileges.

MEMBERSHIP SERVICES

The membership services department covers topics ranging from chapter billings to address changes to death benefits claims. The efficient processing of such services depends on how much accurate information you, the member, can provide. The following information will help familiarize you with certain procedures in the membership service department.

Billing Procedure

Four times a year (around March, June, September & November) each chapter receives a chapter billing from National Headquarters. The procedure is as follows:

1. The Chapter Secretary receives the billing form, a roster, a cover letter and any other miscellaneous pieces of communication that headquarters includes in the package.
2. The Chapter President usually will receive just the cover letter that makes him aware that the billing went out.
3. The Chapter Secretary should give the billing to the Chapter Treasurer whose responsibility is to collect the per capita and other fees that may apply. In the meantime, the Chapter Secretary should make any necessary corrections to the roster and read all correspondence from the mailing at the next chapter meeting.
4. The Chapter Secretary is responsible, once all the dues are collected, for gathering all forms (i.e. reinstatement, transfer, new member applications, etc.) and putting them together along with a check from the Chapter Treasurer for per capita and remitting them to headquarters. In addition, the roster can be returned at anytime. This is the basic procedure for collecting and remitting chapter dues. Should there be any discrepancies with a billing or member's status, please help by providing headquarters with canceled checks, copies of prior billings, etc., to help them solve any problem that your chapter may have.

Frequently asked questions about chapter billing

Q: What are the fees associated with membership in AHEPA?

A: The annual per capita tax is \$40. The initiation fee for new members is \$15. The \$15 must be accompanied with the \$40. Thus, a new member must remit to National \$55. The reinstatement fee for delinquent members is \$10. The \$10 must also be accompanied with the \$40 per capita. Thus, for a delinquent member to reinstate, he must remit \$50 to National (A member is delinquent when he is in arrears of dues for 3 years.) There is a transfer fee of \$2, but this does not go to national. The local chapter who accepts the transfer collects it.

Q: What are the District Dues?

A: A fee per member in order to be a paid member in your District. Each District determines this fee separately.

Q: How is a life membership in the AHEPA obtained?

A: A member becomes a life member with 50 years of service. This means that the member has paid dues for 50 years. A special "one time" life membership card is issued to the member. Chapter Secretaries should inform headquarters when a member reaches this milestone.

Q: When do the Chapter Secretaries receive the membership cards?

A: When the Chapter billing goes out in March. The computer will only print out cards for those members paid for that year. As the year goes by, membership cards will be issued to members who pay their back dues as well as to reinstatements and new initiates.

Q: Our chapter likes to remit dues more than three times a year. Are there any other times where I can receive a chapter billing?

A: Headquarters believes that four billings are adequate for chapters. The Chapter Secretary can make copies of them and use them for future remittances. Make copies of the headquarters list for future remittances.

Q: How do I get membership applications and forms and is there a charge?

A: You can request a membership, reinstatement and transfer form (All on one form) from headquarters through the mail or by phone or via our website www.ahepa.org and click downloadable forms link. There is no charge for these forms.

Other Membership Services and Their Procedures

Address Changes

You can make address changes on the rosters that are sent with the billings. You can ask for your chapter roster anytime you want. District Governors and Secretaries can ask for the District Rosters anytime they please. Address changes can also be made on a separate sheet. Please include serial number of the members when using this procedure. Headquarters requests that address changes not be made over the phone.

Chapter/District Election forms

These forms should be sent to headquarters as soon as your elections are held so they can update their databases. These forms are sent to the chapters once a year and available by calling HQ or visiting www.ahepa.org and clicking the forms and application link. However, you should always ask if you have not received on by the time of your elections.

Chapter/District Labels

You can order labels for you Chapter and District from headquarters at a cost or have them e-mailed to you for free already formatted.

Sale Items

Pins, Ritual Books, etc., are now being handled by our vendor Awards Unlimited. For more information, please visit our web page at www.ahepa.org and click "Shop AHEPA" or by visiting the vendor's website www.awardsunlimited.com.

FINANCIAL PROCEDURES

Overview

The Accounting Department at AHEPA Headquarters has undergone changes over the past few years in establishing procedures and controls to safeguard financial assets.

Questions most frequently asked of the Accounting Department

Q: Is my Chapter tax exempt?

A: Yes. The Order of AHEPA has a group exemption under 501(c) (10) of the Internal Revenue Code which is granted to a domestic fraternal society, order or association operating under the lodge system with net earnings devoted exclusively to religious, charitable, scientific, literary, educational and fraternal purposes and which does not provide for the payment of life, sick, accident or other benefits. Since the Order has a group exemption, all chapters and districts are also treated as exempt organizations under 501(c) (10), as well as the affiliated entities of the Order.

Q: Are the dues that I pay my Chapter deductible on my tax return?

A: No. The 501(c) (10) tax exemption only exempts membership dues **received by your Chapter** from income tax.

Q: Can my Chapter accept Charitable Contributions?

A: Yes. Donations to a 501(c) (10) organization are deductible as charitable contributions on the donor's federal income tax return as long as the Chapter uses the contribution exclusively for religious, charitable, scientific, literary or educational purposes (not fraternal purposes). The Chapter must open up a separate bank account for the receipt and disbursement of these deductible contributions and not co-mingle the contributions with Chapter operating funds. If a donor requests a tax exempt number in connection with a contribution, the Chapter should provide a letter informing the donor that the funds were paid to the Order of AHEPA Chapter #xxx Fund established pursuant to Section 170 (c)(4) of the Internal Revenue Code for educational, charitable or one of the above exempt purposes.

Q: Does my Chapter have a Federal ID Number?

A: The fact that Financial Institutions require Federal ID numbers on accounts is the primary reason for an AHEPA Chapter to have one. Each chapter must have their own IRS assigned number. A Chapter cannot use the AHEPA number, just like a son cannot use his father's social security number. AHEPA Headquarters has a listing of Chapter numbers and can give the Federal ID to a Chapter officer upon request. If a Chapter is in need of and does not have an assigned number, AHEPA Headquarters will assist the Chapter in filing a SS-4 Form. IRS laws change occasionally, so please call headquarters and speak to (Patrice Farish) for any updates and or current changes.

Q: How do I order and pay for pins?

A: Pins and AHEPA merchandise can be ordered over the phone by calling the vendor directly at 1-800-950-3553 or visiting www.ahepa.org and clicking "Shop AHEPA" or by visiting the vendor's website www.awardsunlimited.com. All merchandise is handled by our vendor Awards Unlimited. Merchandise must be prepaid by check or Credit Card.

Q: Can a Chapter pay member per capita by Credit Card?

A: Yes. Credit Card payment is accepted via fax only with signature, name and copy of credit card (front and back) as well as a list of paying members.

Q: When paying per capita, can our Chapter include money that the Chapter owes for other items or donations?

A: No! The Chapter must submit separate checks, one for per capita and one for the other.

Q: Where can I get a copy of the latest version of the Constitution and ByLaws?

A: A free copy is available on the AHEPA web page at: www.ahepa.org by clicking the downloadable forms link. **Headquarters does not pre-print these items anymore!**

PUBLIC RELATIONS / AHEPAN

Overview

The Public Relations department is at the National Headquarters in Washington D.C. The department takes good care of monitoring events and issues on Capitol Hill, across the country and overseas that affect the AHEPA as well as the Greek American community. In addition to this, the department ensures that the AHEPA name is visible in the Greek American community through media relations, news releases, the website and the *AHEPAN* magazine.

Procedures for submission of Chapter News

First, the department suggests submitting articles or news briefs about what the chapter is doing. **Recommended word length: 50 words.** An excellent example of a submission would be Brothers performing a charitable deed or work (i.e., cleaning a nearby park, or presenting a donation). This makes for more appealing reading.

Second, if you have any questions about certain specifications of a photograph or criteria for an article, please contact headquarters. Please address all articles/photos to: *The AHEPAN* at headquarters' address; please provide a phone number with each article.

Photos will not be returned! It is not guaranteed that all articles will be placed, due to space limitations, however all will be considered. **Articles must be submitted electronically for consideration** to ahepa@ahepa.org.

Internet

Asides\ from the obvious ways of communicating with headquarters (mail, phone, fax) we can be reached through the Internet. Through the efforts of this department the AHEPA is online. Headquarters maintains the official website, located at www.ahepa.org, as well as portals for merchandise thru our vendor www.awardsunlimited.com and membership, www.ahepaonline.com. We also maintain a presence on many of the social networking sties like Facebook, and LinkedIn.

In addition, Headquarters broadcasts via email, our eNewsletter, keeps members and supporters abreast of news from the AHEPA Family, the Greek American community, and foreign affairs.

AHEPA Calendar – a listing of national and district events

To request an addition to the calendar contact our online department at webmaster@ahepa.org.

AHEPA Activist/Grassroots Group

The Department can disseminate information on government and public affairs to members who are involved in the AHEPA/Activist/Grassroots Group across the United States and Canada. This is to inform the constituents of events that affect the Greek American community so that they can write their respective Congressman. The department also issues a Congressional Report Card.

To become active in this area, please contact the Department of Public Relations.

Special Events / Conventions

Procedures for National Conventions

Calculating Voting Strength

Voting strength is determined by the year-end figure of members paid in full for that year. For example, for the National Convention in 2011, your chapter's voting strength is determined by the amount of members paid through 2010 as of December 31, 2010. There is a scale, which is located in your constitution that dictates how many votes are assigned to a certain number of paid members.

Reporting of Delegates / Alternates

Based on the voting strength your, chapter will vote for a certain number of delegates and alternates. The number of delegates and alternates will be the same. For example, if your chapters voting strength is three, then you will have three delegates and three alternates to report. The delegate reporting forms are mailed to each Chapter Secretary with the amount of members paid as of the end of year and voting strength printed on the form in March. The forms are to be postmarked no later than June 1. Faxes and Scanned e-mails of this form are also acceptable by the deadline date. Each form requires the member's name, serial number and complete address. Please try to type this information.

Pre-registration

Pre-registration is allowed from the time you know you are a delegate or alternate until the date posted on the pre-registration form. There is a significant saving to each Delegate/Alternate if they pre-register. This allows you to go through the registration line at a quicker pace.

Common questions about Conventions

Q: If our chapter submits our delegate reporting form after June 1, can we seat delegates/alternates?

A: Headquarters is only responsible for presenting the late forms and letters of explanation to the grievance committee at the convention. It is up to that committee to decide if there exists a viable excuse for the late reporting of the form.

Q: Once we send our delegate reporting form into headquarters, can we make changes to it?

A: If you submitted your first form prior to June 1, and the second form with the changes also comes to headquarters prior to June 1, then it is acceptable. Anything after June 1 will go to the grievance committee at the convention.

Q: Can I contest our chapter's voting strength?

A: Yes. We recommend that you compile the proper evidence and bring it to the attention of headquarters prior to the convention.

Q: Will we be notified if there is a problem with our chapter's voting strength or delegate reporting form?

A: Yes, the Chapter President or Secretary will be notified. The notification will come in the form of a letter from the Executive Director.

Q: Asides from the proper reporting of delegates, are there any other criteria I must be aware of to be seated at the convention?

A: Yes. The delegate must be current in his membership status. For example, at the 2011 convention, the delegate must be paid-up through 2011.

Q: Must I be a delegate or alternate to pre-register.

A: Yes.

Q: Can I make room reservations for the convention by calling Headquarters?

A: No! Reservations must be made directly with the Convention hotel by the deadline posted on all convention information. After this deadline, rooms may not be available at the convention rate or available period.

Q: Can I get a refund of my pre-registration fee, if I do not attend the Convention?

A: A partial refund can only be issued if it received at Headquarter **prior** to the date listed on the pre-registration form. Any requests after that will not be allowed!

Q: Can I pay my dues at the convention?

A: Yes, if you have been reported as a delegate/alternate and have not paid your current year dues, you must pay them at the convention in order to be seated.

Q: Can I purchase AHEPA paraphernalia at the convention?

A: Yes, our vendor who services our paraphernalia to our members will be at the convention with items for sale.

CONCLUSION

We hope this guidebook has helped you become better acquainted with AHEPA procedures and dealings with the National AHEPA Headquarters. Most importantly, we hope that we have addressed some of the most common questions that members have. As mentioned in the Introduction, every question and concern has probably not been dealt with. If you have any recommendations for improving the manual or suggestions on adding additional information, contact a member of the National Headquarters. In the meantime, share the guidebook, make copies of it and give it to as many members as possible.

Our contact information remains the same:

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