

# **Joe AHEPA's**

## **Guide to National Headquarters**



**Revised 2018**

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## INTRODUCTION

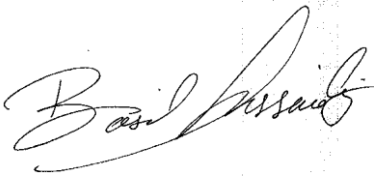
Hello and welcome to the AHEPA Headquarters Handbook!

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.

This guidebook will help educate members and answer questions about certain procedures and the resources available to them at headquarters. Taking the time to review this manual and familiarize oneself with the processes inside will make the relationship between the member and headquarters cohesive and efficient.

Headquarters staff is always available to clarify any of the procedures described in this manual should you still have questions once you've finished.

Fraternally,

A handwritten signature in black ink, reading "Basil N. Mossaidis". The signature is written in a cursive style with a large, stylized initial "B".

Basil N. Mossaidis  
Executive Director

## WHO'S WHO AT AHEPA HEADQUARTERS

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## MEMBERSHIP DEVELOPMENT DEPARTMENT

A membership campaign has been designed to stimulate and engage the entire base membership of AHEPA, implementing the following 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
- ❖ 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](http://www.ahepa.org).

The online membership program was setup as a gateway for national membership.

### Objectives of the Online Membership Campaign

- ❖ Make it easy for people to join AHEPA and donate online
- ❖ Be able to use credit cards to donate and pay dues
- ❖ Be able to provide a gift membership
- ❖ To recommend other potential members
- ❖ Offer a national member online newsletter profiling new members
- ❖ Online Chapter News
- ❖ Invitation to be sent to other potential members

### Membership Development FAQ

#### **Q: What's the difference between being a National Member of AHEPA and joining an established AHEPA Chapter?**

A: Becoming a National Member of AHEPA is essentially becoming an AHEPA member at large. This membership is ideal for those who wish to be active in the AHEPA but either do not have the time to attend local chapter meetings or do not have a chapter near them. National members are able to take advantage of many of AHEPA's incentives, such as scholarship opportunities and travel discounts. National members are also able to attend AHEPA meetings should they desire to, but are unable to be elected to any office or be a delegate to a District or Supreme Convention. National AHEPA members do not have to take an oath and have no voting privileges.

#### **Q: Can potential candidates join a local Chapter online?**

A: No. Members can join as AHEPA National members online. If they decide they would like to join a Chapter, they can call headquarters or email [membership@hepa.org](mailto:membership@hepa.org) to find a Chapter near them to transfer into. Though their national per-capita dues were paid online, they will still be responsible for paying any applicable Chapter dues to the Chapter to become members in good standing.

## 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 form and current rosters from National Headquarters. The procedure is as follows:

- ❖ The Chapter Secretary receives the billing forms, rosters, a cover letter and any other communication from headquarters included in the package.
- ❖ The Chapter President will receive notification from headquarters to make him aware that the billing went out.
- ❖ The Chapter Secretary should give the billing to the Chapter Treasurer who is responsible for collecting the per capita and any 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.
- ❖ The Chapter Secretary is responsible, once all the dues are collected, for gathering all forms (i.e. reinstatement, transfer, new member applications, etc.) and remitting them, along with a check from the Chapter Treasurer for per capita, to headquarters.

The above is the basic procedure for remitting dues to headquarters. Please allow two weeks from the day dues are sent out for processing. If there are any discrepancies with a billing or member's status, please contact headquarters and be ready to provide canceled checks, proof of postmark, copies of prior billing or any other materials that might be instrumental in solving a problem your chapter might have.

### FREQUENTLY ASKED QUESTIONS ABOUT CHAPTER BILLING

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

A: The annual per capita tax is \$45.

**Q: What are District dues?**

A: A fee charged to each paid member in your District. Each District determines this fee separately.

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

A: A member becomes a life member once they have reached **50** years of service. This means that the member has paid dues for 50 years. A special life membership card is issued to the member once they have achieved life membership. This card is only issued **ONCE** and the member will not receive membership cards in the years that follow. Chapter secretaries are responsible for informing headquarters when a member reaches this milestone.

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

A: When the Chapter billing goes out in March. We are only able to print membership cards for members who are paid for the current year. As the year goes on, membership cards are issued to members as their dues are paid.

**Q: Our chapter likes to remit dues more than three times a year. Am I able to receive Chapter billing forms in between official billings?**

A: Chapter officers are now able to pay dues for their members online. Additionally, blank billing forms are available on [www.ahepa.org](http://www.ahepa.org) if you would like to remit dues throughout the year.

**Q: If one of my Chapter members pays dues to headquarters directly, do they still have to pay dues to the Chapter?**

A: Members are only able to pay their per capita National dues to headquarters. To remain active members of a chapter, they have to pay chapter dues directly to the chapter. If a chapter is questioning the validity of a member claiming to have paid HQ already, officers may call HQ to check on the member's status.

**Q: Where can I get membership applications and other forms?**

A: All forms are available on our website [www.ahepa.org](http://www.ahepa.org). If you are unable to access the website and require forms, please call headquarters and they will send them to you free of charge.

## **OTHER MEMBERSHIP SERVICES & PROCEDURES**

### ***Address Changes***

Members have the ability to update their addresses in our system by logging into the membership portal and editing their profile. Additionally, address changes can be submitted on the rosters that are sent with chapter billing or on the address update form found on our website. Headquarters requests that address changes not be made over the phone.

### ***Chapter/District Election forms***

As soon as elections are held, these forms should be submitted to headquarters in order for the database to be updated. These forms are sent to chapters once a year and available online or by calling headquarters.

### ***Sale Items***

Pins, Ritual Books and other paraphernalia are now being handled by our vendor Awards Unlimited. You can visit their site directly at [www.awardsunlimited.com](http://www.awardsunlimited.com) or call them toll free at **1-800-930-3553**.

## 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 National 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 does not have an assigned number and needs one, AHEPA Headquarters will assist the Chapter in filing a SS-4 form. IRS laws change occasionally, so please call or email Patrice Farish at headquarters for any updates and/or current changes.

#### **Q: How do I order and pay for paraphernalia?**

A: Pins and other AHEPA merchandise can be ordered by calling the vendor, Awards Unlimited, directly at 1-800-950-3553 or visiting their website [www.awardsunlimited.com](http://www.awardsunlimited.com). Merchandise must be prepaid by check or credit card to Awards Unlimited.

#### **Q: Can a Chapter pay member per capita by Credit Card if they are not paying via the membership software?**

A: Yes. Members may contact headquarters to obtain a Credit Card Authorization form in order to authorize a credit card payment via fax or email. Unfortunately, we cannot accept credit card payments over the phone.

#### **Q: When paying per capita, can our Chapter include money the Chapter might owe for other items or donations?**

A: No. Chapters must submit separate checks (i.e. Check 1 for dues, Check 2 for National Project Donation, Check 3 for event registration, etc.) in order to expedite processing.



## 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 AHEPA 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. 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). **The recommended word length of the article is 50 words.**
- ❖ 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 or email address with each article.
- ❖ **Photos will not be returned!** We recommend that any photos you wish to submit be submitted digitally, with a resolution of at least 300dpi. It is not guaranteed that all articles will be placed, due to space limitations, however all will be considered.

**ALL ARTICLES MUST BE SUBMITTED ELECTRONICALLY TO AHEPA@AHEPA.ORG FOR CONSIDERATION**

### INTERNET & ONLINE PRESENCE

In addition to mail, phone, and fax, all headquarters staff can be reached via email. HQ maintains the official website, [www.ahepa.org](http://www.ahepa.org), as well as the [@OrderOfAHEPA](https://twitter.com/OrderOfAHEPA) twitter account and [facebook.com/orderofahepa](https://facebook.com/orderofahepa). In addition, Headquarters sends out a weekly eNewsletter to keep members and supporters abreast of news from the AHEPA Family, the Greek American community, and foreign affairs.

### AHEPA CALENDAR

Any District or National events can be found here. To request your event be added to the calendar, please contact [webmaster@hepa.org](mailto:webmaster@hepa.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 Congresspeople. 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 2019, your Chapter's voting strength is determined by the number of members paid through 2018 as of December 31, 2018. There is a scale, which you can find in the constitution, that dictates how many votes are assigned to your chapter based on how many members are paid by the cutoff date.

### 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 number of members paid as of the end of the year and voting strength printed on the form in March. The forms are to be postmarked no later than **June 1<sup>st</sup>**. Faxes and scanned emails 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 are elected a delegate or alternate until the date posted on the pre-registration form. Delegates and alternates who pre-register will not only save money on registration fees, but the on-site registration process will be greatly expedited as all they will need to do is pick up their convention materials and check in with headquarters.

## FAQ 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. If you need to do this, please compile the proper evidence and bring it to the attention of headquarters prior to the convention.

### **Q: Will I 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: What else do first time preregistered delegates or alternates need to know before arriving at convention?**

A: In order to be seated at convention, delegates or alternates must be current in their membership status. This means that if it's the 2019 Supreme Convention, the member must be paid through December 31, 2019. Though you WILL be able to pay on site, HQ recommends making payment at least two weeks before the event to guarantee a smooth registration once on-site.

**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 for the dates necessary.

**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 a written request is received at Headquarters **prior** to the date listed on the pre-registration form. Any requests after that will not be allowed.

## 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, please contact a member of the National Headquarters. In the meantime, please share this with your Chapters and as many members as possible.

For your records, our official contact information can be found below:

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