



# REGIONAL CHAPTER GUIDELINES

## Background

Thank you for being part of the organising committee of a Regional Chapter of the NHAAL. The Regional Chapters represent an important and accessible face of the NHAAL and we want to support you with clear guidelines for establishing and running a group. We also need to ensure this is consistent with the overall aims and accountability of the NHAAL.

The purpose of this document is to provide guidance to existing Regional Chapters and a blueprint for those who may be considering setting up a Regional Chapter in their local area.

## The NHAAL vision

Naturopathy and Western Herbal Medicine for the health of Australia.

## The NHAAL mission

The leading association in Australia supporting naturopaths and Western herbal medicine practitioners to deliver excellence in healthcare.

## Aims of Regional Chapters

Regional Chapters support the NHAAL vision and mission by providing ongoing education and support at a local level and providing an opportunity to build support networks within the community of Herbalists and Naturopaths. This facilitates the sharing of knowledge and continued development of both the individual and the public, which in turn contributes to the promotion of herbal medicine within the broader community.

## NHAAL support

The NHAAL provides a number of support services for Regional Chapters. Current services include:

- Centralised accounting and maintenance of chapter banking where needed (budget provided by each Regional Chapter).
- NHAAL email address. We will set up an NHAAL email address which will forward to a gmail address you can create for your Chapters use.
- Chapter events and meetings advertising on the NHAAL website and via social media.
- Board representation at meetings (where possible).
- Regular updated member contact lists. We will send monthly member lists for your state and you can select those regions/postcodes that are relevant to your Chapter area.
- CPE recognition for attending and coordinating Regional Chapter meetings
- Public liability insurance (NHAAL public liability insurance covers all NHAAL events).

# REGIONAL CHAPTER GUIDELINES

## Regional Chapter requirements

Regional Chapters are required to conform to good practice in regards to:

1. Financial record keeping
2. Minute keeping & Attendance records
3. Privacy
4. Communication
5. Appropriate events
6. Governance, office bearers and annual general meeting

### 1. Financial record keeping

Regional Chapters are self-funding and it is expected that meeting costs will be covered by the Regional Chapter using fees collected.

- We recommend a small amount be charged for attendance at meetings (e.g. \$5 for NHAHA members or students, \$10 other). Cash receipts should be offered to meeting attendees.
- Income and expenses should be recorded in a general ledger and maintained as current at all times. This may be an account book journal with columns for the date, transaction detail, income or expense (available at any stationery store), or an electronic record such as a spreadsheet in Microsoft Excel.
- Records should be maintained as current and available to send to the NHAHA upon request.
- The cash float should also be recorded.
- A cash float should be securely stored and should funds accrue in excess of current requirements, these may be banked with the NHAHA where Regional Chapter accounts are maintained. NHAHA bank account details are available from Anna Simiana on [a.simiana@nhaa.org.au](mailto:a.simiana@nhaa.org.au). Check online for your local branch for deposits.
- Should you need to access these funds please contact Anna Simiana on [a.simiana@nhaa.org.au](mailto:a.simiana@nhaa.org.au) to arrange for payment of Invoices or reimbursements.
- A nominated person should be appointed as accountable for the record keeping process.

### Annual budget (this may not be necessary for very small chapters)

- An annual budget with forecast monthly income and expenses and annual projected profit or loss should be developed each year and forwarded to the NHAHA office.
- **Expenses** may include: venue hire, catering, speaker gifts, end of year event, stationery etc.
- **Income**: based on estimated attendees per meeting.

Go to the ASIC website for information on how to create an Annual Budget and useful templates that you can easily adapt:

<https://www.moneysmart.gov.au/tools-and-resources/calculators-and-apps/budget-planner>

# REGIONAL CHAPTER GUIDELINES

## 2. Minute keeping & Attendance records

When your committee meets to discuss Chapter business (e.g. planning speakers, organising events, AGM, voting in new committee members), minutes need to be taken and sent to the NHAHA after each meeting. You might arrange these meetings separately to your events or hold them beforehand or afterwards. Click on the link below for a useful template of Meeting Minutes (feel free to adapt):

[https://www.acnc.gov.au/ACNC/Publications/Templates/Template\\_minutes.aspx](https://www.acnc.gov.au/ACNC/Publications/Templates/Template_minutes.aspx)

When you run events (such as your regular meetings with a guest speaker or to discuss cases etc) an attendance register is required to be kept. This is simply a list of who attended and can easily be kept by setting up a “sign in” sheet at the door with the event title, date and time. It’s useful to also have a column indicating NHAHA member/non member and one for new attendees who might not be NHAHA members to record their email address so you can send them future information.

## 3. Privacy

All member contact details obtained through the course of Regional Chapter activities will be maintained in the strictest confidence as per NHAHA privacy policy.

Any public/client details used for case analysis within Regional Chapter activities must also be handled with strictest confidentiality and in accordance with legal and ethical code requirements.

## 4. Communication

The NHAHA maintains a number of channels of communication, including:

- **Website** (nhaa.org.au) with dedicated event section for Regional Chapters.
- **Social media:** Facebook and twitter. Regional Chapter events or news can be promoted through these 2 sites.
- **E-newsletter** is emailed to members and may be suitable to include specific information.

If you want to access any of these distribution channels, just email the Office on [nhaa@nhaa.org.au](mailto:nhaa@nhaa.org.au).

## 5. Appropriate events

Regional Chapters operate largely independently, and you have a range of latitude in the frequency and type of events you coordinate. Please bear in mind that this is a public ‘face’ of the NHAHA, and so we would ask that you ensure your events:

- are supportive of the NHAHA vision;
- do not expose attendees to any risk; and
- do not expose the NHAHA to any risk to its reputation.

Types of events that have proved successful in the past include:

- Speakers on issues relating to naturopathy or herbal medicine;
- Panel discussions;
- Case study group discussions;

## REGIONAL CHAPTER GUIDELINES

- Speakers on related topics such as business skills and marketing, specialists in related fields (e.g. Medical fields, Chinese Medicine), Australian Indigenous plant use, herb growers etc;
- Swap and sell events;
- Outings to botanic gardens, herb growers or related exhibitions; and
- Social gatherings at a café or park.

### **Some tips on Planning and Event management**

Events, whilst often casual in nature, should be coordinated professionally and efficiently. To help ensure this is the case, advance planning and delegation of tasks are important.

**Planning:** Try and plan the year ahead. Whilst it can be hard to lock in details that far in advance, it can help gain regular attendees to at least set specific dates (e.g. the 3<sup>rd</sup> Tuesday of every month). You can then work towards speakers or other details for those events. Ask your attendees for ideas, brainstorm as an organizing committee or piggy back off existing NHAA events (e.g. the biennial International Conference means many presenters have talks they have already prepared and may be keen to share). Also keep an eye out for any relevant visitors that may be coming to your area.

**Speakers:** Give people as much notice as possible. Generally the first approach is via email but depending on your relationship to them, a phone call or face to face chat can also work. All details should be confirmed via email so there is a good record and include all relevant details in one place such as time, date, venue, how long they have, IT capabilities/requirements etc. You should also confirm the topic and get a copy of their bio for event promotion (keep this brief, approx. 200 words).

**Promoting events:** attendees also require advance notice, even if your meetings are at a regular time/location. Key points with event promotion:

- Template for flyers: Flyers can be easily emailed and establishing a template for this will keep the format consistent and professional and save time. The NHAA logo is available from the office.
- Email: a synopsis of the talk should also be in the email body to make content easy to access for the reader.
- Upcoming events: include these in your email (e.g. as a PS after you sign off the email).
- NHAA website etc: email your flyer and event details to [nhaa@nhaa.org.au](mailto:nhaa@nhaa.org.au) so it can be included on the website and social media as appropriate.
- Local Facebook page: you may also establish a local Facebook page for events and use the event function here to promote and share.
- Colleges: contacts at local naturopathic and Western Herbal Medicine colleges may also promote your event to students.

## REGIONAL CHAPTER GUIDELINES

**Venue:** The NHAA is a not for profit organization and many community facilities may be available at reduced rates for your group. These include local libraries, halls or even the colleges. Discounts may also be available for advance bookings, useful if you have meeting dates set for the year ahead.

Some venues may ask for proof of Public Liability Insurance before you can book. We can send you a copy of the NHAA insurance coverage for this. Please contact Anna Simiana on [a.simiana@nhaa.org.au](mailto:a.simiana@nhaa.org.au)

**Logistics:** some things to help ensure the smooth running of the event.

- ✓ Reconfirm all details with the speaker one month and 1 week out from event.
- ✓ Promote the event 3 months out, one month out and one week out.
- ✓ Check laptop and data projector are in good working order prior to the event (if required).
- ✓ Arrange catering. E.g. herbal tea and snacks, if required.
- ✓ Arrange to meet at the event before the advertised time to set up the room.
- ✓ Ensure cash box float, receipts, pen, sign-in sheet are all available.
- ✓ Agree a start and finish time with the speaker (and any timing 'signals' you may agree on so they know when they are due to finish).
- ✓ Start on time.
- ✓ Introduce yourself/the committee and the speaker.
- ✓ After the event, thank the speaker. A small thank you gesture such as a card, plant, posy or voucher is a nice touch.
- ✓ Let people know the details of the next event.
- ✓ Pack up room as required.

### 6. Governance and office bearers

Transparency and accountability are as important in volunteer groups as in large corporations. Some good practices to assist this include:

**The committee:**

- As the saying goes, "many hands make light work" and you should look to have a number of people on your organizing committee.
- At least one member of the committee must be a full NHAA member.
- Volunteering requires a time commitment, make sure the committee knows this and considers ways to share this workload to ensure tasks are completed in a timely manner.
- Organising committees should be formed for the year ahead.
- Key positions should be rotated to share skills and experience.

**Accountability:**

- Key positions may be appointed for the year or rotated amongst the group. Key duties include finances (treasurer), communication (secretary) and meeting Chair. These may be further divided so that different people's skills are used and experience developed. For example, no one

## REGIONAL CHAPTER GUIDELINES

person should contact all the speakers and the person who liaises with any given speaker should introduce and thank them at the event.

- Key tasks (which need not be attributed to any one position) include: monitoring the email account, updating distribution lists, contacting potential speakers, preparing fliers, updating social media and other distribution channels, chairing the meeting.
- Communication should be responded to promptly and professionally.
- Meeting Chairs may be rotated each meeting.
- People should not hold key positions for more than 2 consecutive years.

### **Transparency:**

- Ensure no one person has all the information or responsibility as a risk minimization strategy. This includes passwords for email accounts, speaker details and banking/financial information.
- An Annual General Meeting or equivalent should be held each year to establish new committee members including electing a president, secretary and treasurer and update members on finances, events and generate ideas and interest for the coming year.
- New committee members should receive appropriate support and handover as required.

### **Continuing Professional Education (CPE)**

Attendees are eligible for 2 CPE points per meeting attendance. Accurate record keeping will help the office with evidence if required of attendance for CPE purposes. This is where maintaining a register of attendees at any of your events is useful.

### **When to talk to us**

Anytime! But particularly when:

- Submitting your budget for the year;
- Banking excess funds;
- Updating events; and
- Planning key activities such as National Herbal Medicine week.

### **NHAA Key contacts**

Telephone: 02 9797 2244

General email: [nhaa@nhaa.org.au](mailto:nhaa@nhaa.org.au)

Street address (if you want to visit): 3/2-4 Holden St, Ashfield NSW 2131

Postal address (for all mail): PO Box 696, Ashfield NSW 1800

*Many thanks, your efforts are appreciated.*