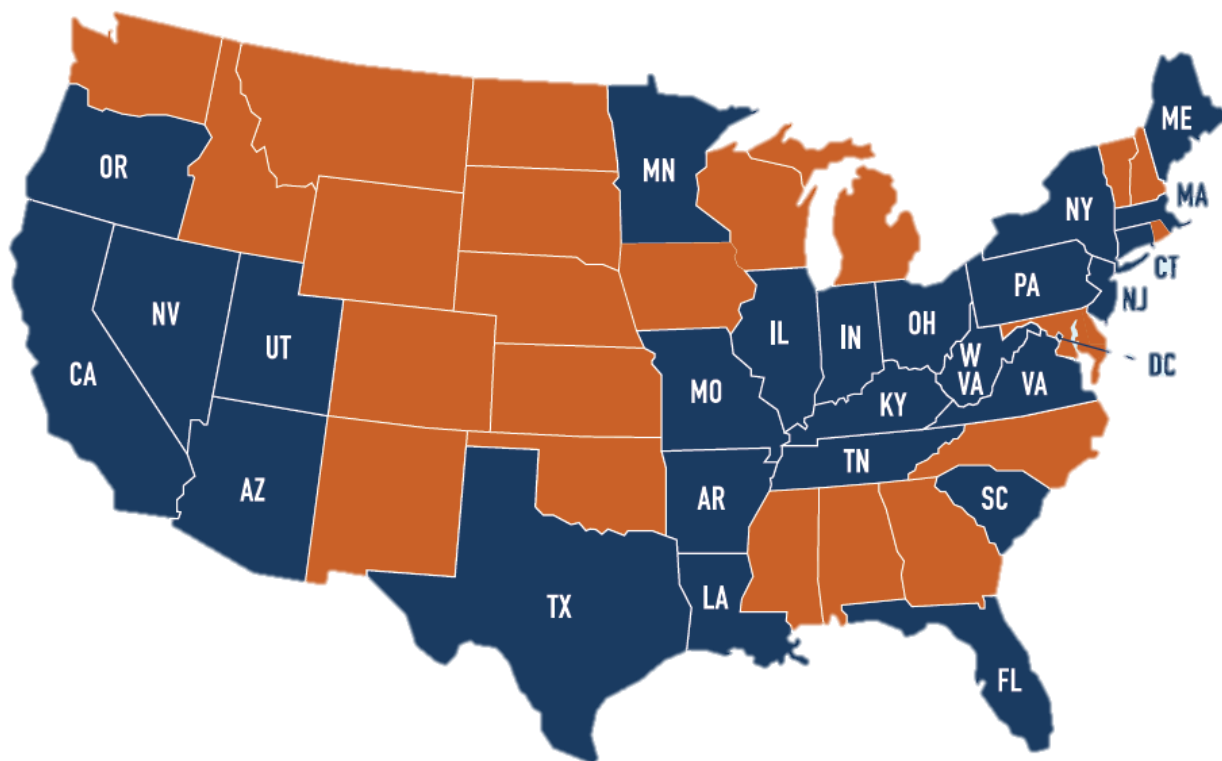


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What is a State Affiliate?

The AGS State Affiliates offer professional education, networking and advocacy at the local state level.

Since 1987, the American Geriatrics Society (AGS) has worked to establish a presence at the grass roots level. The AGS launched the State Affiliate program in 1991 through the efforts of a number of committed members. To date, there are 27 established State Affiliates. The growing number of AGS State Affiliates has increased the visibility of geriatrics medicine throughout the country. The majority of AGS State Affiliates began with only a few individuals who were concerned about providing quality health care to older people. These individuals generally had at least one goal in mind, such as establishing an educational and professional network, improving the quality of geriatrics education in their area, or making an impact on public policy issues. A full list of State Affiliates can be found at www.AmericanGeriatrics.org/StateAffiliates.

State Affiliate Responsibilities

The AGS State Affiliates must register as separate 501 (c) (3) entities, and offer professional education, networking and advocacy at the local state level. State Affiliates have independent leadership and can choose to manage their membership lists and dues or have AGS manage them for them.

The State Affiliates must complete a State Affiliate Assessment on an annual basis. This Assessment is used by the AGS to monitor state affiliate activities, and gauge the needs of each affiliate.

AGS's Commitment to State Affiliates

AGS offers start-up assistance and ongoing resources to State Affiliates including:

Start-up Assistance:

- Assistance during the organization process, including help with articles of incorporation to open a bank account and gain tax-exempt status, help with the creation of by-laws, general job descriptions, a newsletter announcement of the intent to organize, etc.
- \$450 in seed money upon approval of provisional status to be used for mailings, meetings, educational programs, etc.
- A list of AGS members in the affiliate's state for recruitment purposes (upon approval of provisional status).

Ongoing Support:

- Optional membership dues and membership list management

- Promotion and maintenance of the AGS State Affiliate webpage listing
- Promotion of State Affiliate events on AGS Online event calendar
- Spotlights in the AGS Week in Review listserv and Newsletters
- Affiliate advertisement in the *Journal of the American Geriatrics Society* and *Annals of Long Term Care*
- One seat on COSAR, support of COSAR includes:
 - bi-annual meetings
 - MyAGSONline COSAR Community Forum
 - Monthly Listserv

[A full, printable list of resources can be found here.](#)

How to Start a State Affiliate

Step 1: Notify AGS of Intent

- Email Ashley Morris, Director of Member Services & Relations of intent by email at amorris@americangeriatrics.org.

Step 2: Apply for Provisional Status

- Affiliates must be representative of at least one metropolitan area.
- An announcement of the intent to organize an AGS affiliate must be made in the AGS Newsletter.
- A letter must be sent to all AGS members in the applicant's state (or region represented by the future affiliate) announcing the intent to organize an AGS affiliate. The developing affiliate is required to write the letter and the mailing will be handled by the national organization.
- At least one organizational meeting must be held by a minimum of ten people.
- An official representative of the organization must be appointed to serve as the contact person (COSAR rep) with the national office. This person must be an AGS member.

Once these requirements are met, a [state affiliate provisional status application](#) must be submitted to the AGS national office via email to amorris@americangeriatrics.org.

- The application will be circulated to the COSAR Co-Chairs and the AGS Executive Committee, which will grant or deny provisional status. Provisional status is given to affiliates that appear potentially able to meet the guidelines for State Affiliates as outlined in the model by-laws within two years of the time that provisional status is granted. The applicant will be informed in writing of the Executive Committee's decision.
- Upon approval of provisional status, seed money will be sent to the new affiliate in the amount of \$450. This money is to be used to assist with organizing for official status, such as for the following purposes: development of by-laws, mailings to members and potential members, organization of meetings, and educational programs.

Step 3: Apply for State Affiliate Official Status

Provisional status will be effective for two years, during which time the affiliate must:

- Hold at least one state-wide meeting to elect officers
- Develop and submit affiliate by-laws
- Obtain a federal tax ID number and a separate 501 (c)(3) tax-exempt status (or may contact the AGS regarding a group exemption). To be an official not-for-profit, an affiliate should file articles of incorporation, which is a charter with the state and a 501 (c) (3) tax-exempt status form, which is a federal requirement that will require a tax ID numbers and the articles of incorporation. The affiliate will not be able to open a bank account or take advantage of the benefits of tax-exempt status without these documents. The AGS recommends starting this process at the beginning of the affiliation process.
- An affiliate must become incorporated to have official AGS affiliate status.

AGS staff and COSAR will review the by-laws of the provisional affiliate and will submit the by-laws to the Board of Directors for approval. Affiliate status is finalized upon approval of the by-laws. The affiliate will be notified in writing of the Board's decision.

Checklist:

Obtaining Provisional Status

- ___ Notify AGS of intent at amorris@americangeriatrics.org
- ___ Decide on area for affiliate
- ___ Announce intent to organize by letter to all AGS members in state
- ___ Publish announcement on intent to organize in AGS Newsletter
- ___ Hold first organizational meeting
- ___ Appoint an AGS COSAR Representative
- ___ Fill out provisional status application form and return to AGS
- ___ Receive notification of provisional status from the national office

Obtaining Official Affiliate Status

- ___ Hold second organizational meeting
- ___ Elect officers and board members
- ___ Develop a committee to write by-laws and articles of incorporation
- ___ Approval of by-laws and articles of incorporation by affiliate membership
- ___ Approval of by-laws and articles of incorporation by AGS Board of Directors
- ___ Receive notification of affiliate status
- ___ Incorporate at the state level using a local attorney
- ___ Complete and file Form SS-4 (application for Employer ID Number)

Obtaining Tax Exempt Status:

- ___ To discuss your tax exceptions status process contact Phillip Washburne in the Finance Department at (212) 308-1414.

What is COSAR?

The Council of State Affiliate Representatives (COSAR) is the governing body of the AGS State Affiliates.

COSAR is comprised of elected member representatives, one from each of the proposed, provisional and active State Affiliates. Provisional and active affiliates have voting rights. COSAR meets biannually in order to exchange information on State Affiliate activities, and to share new ideas on development, advocacy, education, membership, public policy and other affiliate business. The AGS is committed to strengthening the affiliate program and established COSAR as an important, deliberate body to promote and support the affiliates. Below are the basic criteria for participation in COSAR:

1. An active or provisional affiliate that has formal approval from the Council and the AGS Board of Directors is eligible to elect one representative to COSAR.
2. The elected representative to COSAR from the affiliate must be a member of the AGS.
3. An affiliate's COSAR representative serves a three-year term. Terms longer than three years are up to the discretion of the affiliate. COSAR Co-Chairs must approve the extended term.

Two representatives, the Council Co-Chairs, serve on the AGS Board of Directors for a three-year term. The Co-Chairs, by reporting to the AGS Board, represent the Council as it relates to issues affecting affiliate membership organization. These issues include development, membership, public policy, advocacy and other affiliate business.

COSAR Responsibilities

COSAR Members:

To strengthen reciprocal relationships between State and National organizations in Geriatrics, expectations of the State Affiliate Representatives include knowledge of the AGS mission and goals and the AGS current strategic highways.

State Affiliate Representatives are responsible for:

- Representing their state via membership on the Council of State Affiliate Representatives (COSAR) and attend bi-annual meetings of the Council.
- Working at the local level to assure that the Affiliate has a structure in place for identifying and developing leaders thereby assuring the long-term viability of the Affiliate.
- If the Affiliate is taking advantage of the services offered by AGS staff, facilitating interactions between the staff and affiliate leaders and members.
- Responding to AGS staff queries in a timely manner.
- Reviewing agenda materials in advance and coming prepared with comments and ideas.
- Developing educational programs to advance interdisciplinary geriatric education.
- Disseminate evidence-based clinical practice guidelines in Geriatrics.
- Spokesperson for your local affiliate and the American Geriatrics Society with the media and other organizations requesting local contacts and where your expertise fits the topic at hand.
- While recognizing that each State Affiliate will have its own unique goals, AGS encourages COSAR to collectively set goals whereby each affiliate can measure benchmarks and progress. In

advance of the annual AGS scientific meeting, each state representative, in collaboration with other Affiliate Leaders, will be asked to identify which areas they would like to focus on in the coming years.

COSAR Co-Chairs

According to the AGS by-laws: "The Council of State Affiliate Representatives shall elect one member of the Council for each open state affiliate seat on the Board; nominees must be members of the national organization. The elected COSAR representative will be reviewed by the Nominating Committee for final approval. Terms for COSAR representatives will be staggered; each representative may serve up to two three-year terms as COSAR representatives."

State Affiliate Co-Chair Criteria

- Active in geriatric medicine at the state and local level
- Able to represent and articulate the views of the state affiliates
- Time to devote not only to the AGS Board of Directors and committees, but also to conduct projects with the Board and staff on behalf of the state affiliates
- Knowledge of the AGS history and its positions

State Affiliate Co-Chair Responsibilities

- Serving on the AGS Board of Directors and assuming all the duties and responsibilities of an AGS Board member.
- Working with staff on planning the agenda for the bi-annual meeting and co-chairing the bi-annual meeting.
- Mentoring new affiliate representatives.
- Being available to leaders of new and provisional Affiliates to provide advice and counsel on establishing and maintaining a state affiliate.
- Identifying AGS projects and programs where State Affiliates could be helpful in advancing our shared goal of improving the health and well-being of older adults.
- Collaborating on an analysis of the annual feedback to the Society from State Affiliate representatives in order to identify common themes.



COSAR Community

ALL State Affiliate and COSAR resources can be accessed from this community. All State Affiliate leaders and COSAR representatives have access. You can get to the community directly via bit.ly/AGSCOSARCommunity.



Ask for advice, share a best practice or useful resource with other State Affiliate leaders. AGS also posts updates and COSAR meeting information to the community.

I WANT TO:

FIND IT HERE:

Promote our State Affiliate to AGS Members

Send an automated welcome email to new AGS members in my state.	Email welcome text with contact information and links to amorris@americangeriatrics.org
Add our State Affiliate events to the AGS Events Calendar.	Add an event here: bit.ly/COSAREvents or email lkopchik@americangeriatrics.org
Request a mailing list of AGS members in my state (AGS will facilitate on your behalf upon request, on a quarterly basis).	Email jpark@americangeriatrics.org
Staff the State Affiliate Booth at the AGS Annual Scientific Meeting.	Email amorris@americangeriatrics.org . Sign up sheet will be posted in COSAR Community
Be featured in the AGS Quarterly Newsletter or Week in Review Listserv.	Email lkopchik@americangeriatrics.org .

Collaborate with other State Affiliate Leaders

Ask for advice or share a best practice with other State Affiliate leaders.	Post in the COSAR Community in MyAGSONline at bit.ly/AGSCOSARCommunity
Attend a Council of State Affiliate Representatives (COSAR) Meeting.	View COSAR events and meeting info at bit.ly/COSAREvents
View a list of State Affiliate leaders.	Browse and contact at bit.ly/StateAffiliateLeaders

Update State Affiliate Leadership & Information

Inform AGS about changes to State Affiliate leadership and other information.	Regularly review your listing at www.americangeriatrics.org/StateAffiliates and email amorris@americangeriatrics.org
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Receive Recognition and Funding

Apply for the State Affiliate Achievement Award.	The application is posted in the COSAR Community each January.
Get fundraising tips.	Access the "Fundraising at the Local Level" resource under "Toolkits & Resources" in the COSAR Community at bit.ly/COSARResources .

Prepare for Succession Planning

Learn how to promote opportunities, identify leaders and transition incoming and outgoing leadership.	View the "State Affiliate Succession Planning Toolkit" resource under "Toolkits and Resources" in the COSAR Community at bit.ly/COSARResources
Create a State Affiliate job or volunteer position.	Access the "State Affiliate Model Job Descriptions" resource under "Toolkits and Resources" in the COSAR Community at bit.ly/COSARResources
Promote a State Affiliate volunteer position.	Email amorris@americangeriatrics.org to post an opportunity to the AGS Volunteer portal and share with members in your state.

Advocate Locally

Find elected officials, subscribe to action alerts and contact local officials.	Access the AGS Advocacy Center at http://cqrcengage.com/geriatrics
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Promote AGS Membership to Our Members

Request an AGS State Affiliate Care Package for resources to use at your events.	Email jpark@americangeriatrics.org
Share your State Affiliate membership list with the AGS.	Email amorris@americangeriatrics.org

Get Help Managing Membership Invoices

Request to have AGS manage your membership invoices.	Email jpark@americangeriatrics.org . AGS will use your current membership list and invoice members when it is time to renew. AGS will collect dues on your behalf for new and renewing members and disburse them to you on a quarterly basis. AGS should be given a month's notice for any changes to dues.
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Suggest New Resources

We are always looking for resources to add and enhance. Suggest a new resource and/or volunteer to help develop a template.	Post in the COSAR Community at bit.ly/AGSCOSARCommunity or contact amorris@americangeriatrics.org .
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Connect with COSAR Leadership

The COSAR Co-Chairs are here for you and your State Affiliate.	Contact Kathy Frank at katfrank@iu.edu or Diane Chau at dianechau@gmail.com
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