



On behalf of the National Association of Certified Professional Midwives, I am delighted to hear that you are interested in forming a NACPM State Chapter!

A powerful, unified voice for Certified Professional Midwives will enhance our collective ability to support and strengthen our profession, and to improve maternal health policy nationwide. As our profession grows, a strong national association working with an effective network of NACPM Chapters will support the role of CPMs as primary maternity care providers for childbearing women and their families in the United States. NACPM looks forward to working with you to meet your state's needs and challenges, to help you share with your peers how you have achieved your victories, and to improve state and national policy for the sake of women, babies, families and communities.

To help you get started, we offer this information packet for state leaders interested in learning about and/or applying to become NACPM State Chapters. Specifically, this packet includes:

1. **An Overview of the NACPM State Chapter Program** including a brief description of the program's vision, structure and benefits/services to State Chapters;
2. **Information and Tools for creating a State Chapter** including the process for incorporation, for creating bylaws and policies, and other resources;
3. **[Intention to Form Chapter](#)**, which identifies primary liaison (electronic version available);
4. **NACPM's State Chapter Agreement**; and
5. **An Application Checklist** describing the submission process for becoming a State Chapter.

We are your partners in this process and are here to work with you along the way. If you have any questions or if you are ready to start a chapter, please contact our administrative assistant, Adriana Elliot, at admin@nacpm.org or (603) 358-3322.

Again, thank you so much for joining with NACPM to promote and support Certified Professional Midwifery across the nation. We look forward to working with you.

Sincerely,

Mary Lawlor, Executive Director, NACPM



Overview of NACPM's State Chapter Program

I. Vision Statement

Vision

NACPM envisions a primary maternity care system in our country where all women access care through a midwife, where birth place is the choice of the family, and where all women and babies have the same chance to be healthy.

Purpose

NACPM's purpose is to be a powerful and unifying voice for Certified Professional Midwives. We strengthen and support excellence in the profession and influence maternal health policy to ensure that all mothers and babies have a healthy start.

Why form an NACPM State Chapter?

The promise of a National Association of Certified Professional Midwives State Chapter Program is the creation of a unified voice for the profession, the model of care, and the benefits that accrue to women, babies and families from CPM care. Achieving our bold, shared goals of improving the maternity system and patient outcomes will require significant development at both the state and national levels.

States have authority over CPM licensing, scope of practice and governance. Federal agencies develop laws and policies guiding health care delivery, access, reimbursement and innovation that impacts CPMs at the state and local level. CPMs need a coordinated structure to be most effective in enhancing our national influence and to support states in advancing midwifery care locally.

There are many examples of the need for national/state partnerships, including:

- Supporting licensure for CPMs in all 50 states
- Achieving recognition of CPMs as primary maternity care providers in the US health care system
- Creating opportunities to increase and diversify the CPM workforce
- Eliminating obstacles to payment and improving reimbursement rates

While there are many shining examples among the states of well-organized and effective state associations, we still have much to do to create a unified voice for Certified Professional Midwifery. A structure for relationships among the states, and between the states and a national professional association, is a significant missing piece in the development of direct-entry midwifery in the United States. Forming NACPM State Chapters and building a structure for these relationships are critical next steps in advancing the CPM profession.

II. Structure

NACPM's State Chapter program is based on a model in which each State Chapter is incorporated as a separate legal entity with nonprofit tax-exempt status, and is affiliated with NACPM through an annual State Chapter agreement. This agreement is framed around a shared commitment to our common vision, and is drafted in the spirit of collaboration, mutual responsibility and collective impact. NACPM's goal is to work closely with established state associations, and there shall be only one NACPM State Chapter per state.

Specifically, key elements of the State Chapter agreement include:

- Clear rights and responsibilities for both NACPM and State Chapters
- A policy that State Chapter members must also be NACPM members
- A policy that State Chapters have the flexibility to set their own dues if desired
- National NACPM membership dues are \$125 per year (or a reduced \$75 rate for those with income constraints). Of these dues, NACPM will contribute \$25 per CPM member of its membership rate back to State Chapters as an added benefit to support local efforts
- A policy clarifying communication and use of NACPM's name by State Chapters
- Annual reporting requirements for State Chapters
- A responsibility on the part of State Chapters to share information, lessons learned and other tools that might serve as a resource to NACPM and other Chapters
- A policy that every State Chapter identify a leader to serve as the liaison to the national office
- Clarification that either party can terminate the agreement & that disagreements will go to mediation prior to litigation

III. Benefits & Services to State Chapters

To support State Chapters, NACPM commits to the following, ongoing services and resources:

- Access to regular webinars, conference calls, resources and tools designed exclusively for Chapters leaders and members (e.g., forums on state policy changes or USMERA updates, specific resources to support state leaders and their members, state leader conference calls)
- Discounts on continuing education opportunities and events offered by NACPM
- Legislative, regulatory and technical assistance
- State Chapter member information and dues collected through NACPM's membership system
- \$25 for each State Chapter CPM member will be sent annually from NACPM to the State Chapter to support Chapter start-up or activities
- One-time \$500 gift for each State Chapter to support start-up from an NACPM corporate donor, Southern Cross Insurance Solutions
- Access to affordable Board of Directors insurance through NACPM insurance policy
- Access to 501(c)6 IRS non-profit status as part of NACPM's IRS Group Ruling
- Chapter webpage on the NACPM website if requested
- Chapter logo
- State leader toolkits (e.g., resources for starting a Chapter, sample by-laws, templates)
- Overview of national and state-level information (e.g. landscape of state policies, CPM facts/numbers)
- CPM rationale/messaging (e.g., rationale for becoming a CPM, joining a professional Chapter, benefits of integrating CPMs into maternity care system)
- State licensure and legislative resources from NACPM and other states
- NACPM position papers and policy examples from other states



Information & Tools for Creating a State Chapter

NACPM is here to support you! The legal and IRS process for creating a State Chapter is relatively straightforward. Below is a step-by-step process to guide your efforts. Again, we are here to help you so please do not hesitate to contact us if you have any questions (chapters@nacpm.org).

Legal Entity

NACPM recognizes that State Chapters may be at different stages of organization, from full incorporation and tax-exempt IRS status to a more informal, loosely organized group. To be part of this program, State Chapters must be incorporated as separate legal entities, have an Employer ID Number (or EIN), and hold nonprofit tax-exempt status. This provides legal protection to state leaders and forms the basis of our joint Chapter agreement.

How to do this:

1. **Incorporate as a nonprofit legal entity.** The simplest way to do this is to visit your Secretary of State's website and file as a nonprofit corporation. As part of this process, your state will ask for Articles of Incorporation, which NACPM can provide as a template if that's helpful. We recommend naming your organization either the "[Fill in State Name] State Chapter of NACPM" or "NACPM [Fill in State Name] State Chapter."
2. **Get an Employer Identification Number (EIN) from the IRS.** The EIN is a unique number that identifies your organization to the IRS and is required even if your Chapter will not have employees. You must have incorporated at the state level first to get an EIN (step #1 above). Apply for your EIN online at: <https://sa.www4.irs.gov/modiein/individual/index.jsp>
 - On the first screen, select "view additional types..." (last option)
 - On the next screen, select "other non-profit/tax-exempt orgs" (last option)
3. **Attain federal tax-exempt status.** State Chapters can do this in one of two ways. It can agree to terms and procedures outlined by the IRS that will allow NACPM to include them in its "group ruling" exemption for a fee of \$200 or it can apply for its own individual tax-exempt status with the IRS (using Form 1024).

Being part of the group ruling simply means that you do not need to go through the process of applying for a tax exemption status separately. NACPM is classified by the IRS as a 501(c)6 membership association. This means that NACPM is a not-for-profit organization. Dues, donations, and other monies received by NACPM may not be classified by individuals or organizations as charitable or non-taxable contributions. Any State Chapter opting to be part of the group ruling will also be considered a 501(c)6 organization.

If you're interested in being part of NACPM's group ruling exemption, please let us know. We will walk you through the process. In brief, there are some things the IRS and NACPM require your State Chapter to have or do under a group ruling:

- A fiscal year that mirrors NACPM's for your bookkeeping (January 1 - December 31)
- A federal EIN
- A bank account and book-keeping system
- A completed NACPM application and signed State Chapter agreement
- A set of policies and by-laws (more details on this below)
- Annual federal tax filing submission using financial disclosure forms (Form 990 or 990N "postcard" filing) (see more information on this below)

Of note, incorporation (step #1 above) is not the same as "tax-exempt status" (step #3), a term the IRS uses to exempt certain organizations from federal income tax. State Chapters will need to attain federal tax-exemption separately, either through NACPM's group ruling or individually. Federal exemption also does not relieve your organization of the obligations to pay state and local taxes.

Tax Filings

Federal, state and local governments require tax filings for every State Chapter. Below is an overview of what State Chapters are responsible for and where NACPM can be of assistance:

1. **Federal tax filings.** The federal government requires both NACPM and all State Chapters to file taxes annually using an IRS Form 990 or—if annual income is under \$50,000—using Form 990N (known as the "postcard"). Failure to submit these forms for 3 consecutive years will result in the State Chapter automatically losing tax-exempt status. When this happens, the national office is very limited in what it can do to help regain tax-exempt status.
 - If your State Chapter elects to be part of NACPM's group ruling, NACPM can help file your 990N form with you. (If you want NACPM to do this filing for you, we will need a report from your Chapter listing your income, sources of income, expenditures and categories of expenditures by March 15th of each year.)
 - If your State Chapter pursues its own tax-exempt status (for example, is a separate 501(c)6 organization), then the State Chapter is wholly responsible for filing its federal taxes.
2. **State & local tax filings.** All State Chapters are responsible for their own state and local taxes.

Governance / Management

Each State Chapter should have the following governing documents and systems in place:

1. **State Chapter bylaws.** Your State Chapter bylaws outline the officer positions and tasks assigned to each position. Most State Chapters have the positions of President, Vice President, Secretary, or Treasurer. When there is a change in officers, please notify the national office. If you are creating a new Chapter, NACPM can provide you a sample by-law template.
2. **State Chapter bank account.** Please establish a bank account at a bank of your choosing. NACPM's one-time \$500 from our corporate donor, as above, can be used to open an account if you choose.

3. **State Chapter policies.** The IRS annual non-profit tax return (Form 990) requires that non-profit organizations have specific policies in place. These policies include:

- Conflict of Interest Policy
- Record Retention Policy
- Whistleblower Policy
- Leadership Guidelines for Ethical Conduct Policy

Each Chapter leader should read the policies, sign NACPM's Policy Acknowledgement Form, and file the forms with the State Chapter Secretary annually. NACPM will provide policy templates for your convenience.

4. **State Chapter agreement** signed annually and sent to the national office.

5. **Bookkeeping system.** We highly recommend setting up a simple bookkeeping system to manage your revenue and expenses. This will also be important for federal tax filings (Form 990).

Quickbooks Online is one helpful tool; small business plan/pricing options are available here: <http://www.quickbooks.intuit.com/pricing/>

6. **Membership database system.** For state and local tax filing purposes each Chapter must maintain records of membership status and payment of dues. To assist Chapters with this responsibility, NACPM will send Chapter membership records to Chapters on a quarterly basis, or as requested by the Chapter liaison.

Insurance

Each State Chapter is required to hold Directors & Officers insurance coverage. D&O insurance provides general liability coverage to your directors and senior leaders. It reimburses (in part or in full) the costs resulting from lawsuits and judgments arising out of poor management decisions, employee dismissals, stakeholder grievances, and other such acts committed in good faith. Criminal offenses are not covered under this insurance. If interested, a Chapter can elect to be included on NACPM's Directors and Officers insurance policy for a fee of \$100.

Membership & Dues

State Chapters have full flexibility to set state-level dues. State-level dues will be collected by NACPM and are the sole propriety of the State Chapter. NACPM will send state-level dues to the State Chapter on a quarterly basis, along with updated Chapter membership records. .

NACPM does require that all State Chapter members be NACPM members. NACPM membership is currently \$125 per year (or a reduced rate of \$75 for those with income constraints). The national office retains the authority to set and collect NACPM dues.

NACPM will collect dues for national members, and state-level dues, if any. Under this arrangement, members who join NACPM will have the option of joining their State Chapter simultaneously. NACPM will contribute \$25 to the State Chapter for every CPM member per year who also elects to join the State Chapter. To coordinate this, State Chapters agree to direct prospective State Chapter members to the NACPM website where they will join/renew at both the national and state levels.



Intention to Form Chapter

I have read the NACPM State Chapter Launch Packet/Agreement and hereby affirm that it is my state's intention to proceed with creating an NACPM State Chapter.

By signing this form, I agree to serve as the primary point of contact/state liaison for coordinating my state's application process with NACPM. I will let NACPM staff know if/when this responsibility transitions to someone else in my state. I also give permission to NACPM to share my contact information to those interested in our State Chapter activities.

Note: This form may be completed online, at <http://nacpm.org/intention-to-form-a-state-chapter/>

Proposed Chapter Name: _____

Printed Name of Primary State Liaison

Signature of Primary State Liaison

Date

Contact Info for Primary State Liaison:

Email Phone

Mailing Address

City, State, Zip



NACPM State Chapter Board Members Contact Form

Please include the names, titles, and contact information for each of your board members here:

Board member name:

Title:

Contact information (phone, email, & mailing address):

Board member name:

Title:

Contact information (phone, email, & mailing address):

Board member name:

Title:

Contact information (phone, email, & mailing address):

Board member name:

Title:

Contact information (phone, email, & mailing address):



NACPM State Chapter Policy Acknowledgement Form

To be completed by each board member.

Policies can be viewed online, at <http://nacpm.org/for-cpms/chapters/chapter-formation-documents/>

I have read the NACPM State Chapter Leadership Ethical Guidelines and Governance Policies and agree to comply with the terms and conditions at all times during my service in the leadership of this organization. If at any time following the submission of this form I become aware of any actual or potential non-compliance to these policies, I will promptly notify the officers of NACPM. Please initial.

1. _____ NACPM State Chapter Leadership Ethical Conduct
2. _____ NACPM State Chapter Conflict of Interest Policy
3. _____ NACPM State Chapter Records Retention Policy
4. _____ NACPM State Chapter Whistleblower Policy
5. _____ I have ensured that my NACPM membership is current

Printed Name

Signature

Title, Office or Position

Date



NACPM State Chapter Agreement

Under the authority of Article I of the NACPM corporate by-laws, the NACPM Board of Directors hereby enters into this State Chapter agreement, made on _____, by and between the National Association of Certified Professional Midwives (NACPM) and the _____ (“State Chapter”).

1. COMMON PURPOSE

We enter this agreement with a shared purpose of improving maternity services in the United States by strengthening the certified professional midwife (CPM) profession. Together, we aim to advance national and state policy through a system of well-connected State Chapters. Specifically, we will work collectively to:

- Build a more cohesive, influential, diverse and effective CPM workforce
- Empower, connect and support CPMs across the United States
- Influence national and state health policy with the value inherent in CPM care
- Advocate for regulation that supports autonomous midwifery practice
- Organize CPMs at both national and state levels to promote effective public policy
- Share success stories, best practices, resources and learnings
- Provide educational opportunities for midwives and advocates
- Increase public awareness about the value and importance of normal physiologic birth

2. STATE CHAPTER ORGANIZATION

State Chapters must be incorporated as legal entities, have an EIN number and hold nonprofit tax-exempt status.

A. By signing this agreement, the State Chapter confirms that it has incorporated as a legal entity (check one):

- a) A nonprofit corporation registered in the State of _____; OR
- b) Other (please describe): _____.

B. The EIN number for this State Chapter is: _____.

C. A State Chapter can obtain nonprofit tax-exempt status either by choosing to be under NACPM’s 501(c)(6) Group Exemption/Ruling *or* by obtaining this on its own. By signing this agreement, the State Chapter confirms that (check one):

- a) It has elected to be part of the NACPM IRS Group Ruling. (By selecting this option, the State Chapter agrees to a fee of \$200 and maintaining a record of required policies); OR

- b) ____ It has established its tax-exempt status by preparing and submitting its own Form 1024 application to the IRS and paying the applicable fee.

D. The State Chapter annual dues amount: \$_____ (N/A if no State Chapter dues)

3. RIGHTS AND RESPONSIBILITIES

NACPM and the State Chapter share a commitment to the Common Purpose as outlined in Section 1. We enter this agreement in the spirit of collaboration, mutual responsibility and collective action.

A. NACPM

NACPM commits to advancing the Common Purpose and supporting State Chapters through activities including but not limited to:

- Facilitating connection, communication and support between State Chapters and NACPM through conferences, webinars and regular conference calls
- Providing access to certain webinars, resources and tools designed to benefit State Chapter leaders and members
- Providing State Chapters with national/state data or information as available
- Supporting the State Chapter through legislative/regulatory assistance and technical support
- Soliciting feedback and involvement from State Chapters
- Helping maintain common standards of practice for CPMs in the United States
- Issuing policy and position statements that serve our Common Purpose
- Providing educational opportunities for State Chapter midwives and advocates
- Offering State Chapter members access to and discounts on continuing education
- Hosting State Chapter webpage on the NACPM website if requested
- Providing member information management support and member information to the State Chapter if requested (see Section 4)
- Providing \$25 of each State Chapter CPM member's national dues to support Chapter start-up or activities
- A one-time \$500 gift for each State Chapter to support start-up from an NACPM corporate donor, Southern Cross Insurance Solutions
- Access to Directors and Officers insurance through NACPM's insurance policy
- Access to 501(c)6 IRS non-profit status as part of NACPM's IRS Group Ruling
- Maintaining NACPM's corporate status and duty to file taxes, and operating in a manner consistent with its by-laws

B. State Chapter Activities

The State Chapter commits to advancing the Common Purpose and engaging in activities congruent with NACPM's mission, purpose and policies and the provisions outlined in this agreement. These may include but are not limited to:

- Supporting professional licensure regulations and legislation related to midwifery and women's health issues
- Presenting information to the public and government representatives concerning quality midwifery and women's health practices and services
- Promoting excellence in the practice of midwifery and the education of midwives

- Supporting research or educational activities in the field of midwifery and women's health
- Sharing information, expertise and learnings with NACPM and other State Chapters to support collaboration
- Issuing Chapter-specific positions, policy statements and letters in support of legislation or regulation
- Soliciting donations, funds and other third party sponsorships for Chapter activities
- Developing educational symposia, professional conferences and written publications
- Sponsoring and endorsing governmental and non-governmental policies and programs related to the professional field of midwifery

C. State Chapter Requirements

The State Chapter agrees to the following requirements:

- The State Chapter will comply with all federal and state laws, regulations and NACPM State Chapter policies that may affect this agreement
- The State Chapter is responsible for its own finances and federal/state tax filings
- The State Chapter will adopt and maintain policies required for group ruling status, if selecting this option in Section 2C above.
- The State Chapter will maintain a fiscal year that is consistent with NACPM's fiscal year (January to December)
- The State Chapter is required to hold Directors & Officers insurance coverage; the Chapter can elect to be included on NACPM's policy at a fee of \$100
- The State Chapter will identify a leader to serve as the liaison to the national office
- The State Chapter must endorse NACPM's mission, purpose and Essential Documents and Standards of Practice
- Any non-voting members of the State Chapter, such as consumers or other professionals, may choose to join NACPM as associate or student members
- The State Chapter will not engage in activities or actions that cause NACPM to be legally or financially bound to agreements or other relationships without express written permission from the NACPM Board of Directors
- The State Chapter agrees to the communication and use of name terms as outlined in Section 5
- The State Chapter agrees to contribute to research and collection of data about CPMs in its state as part of NACPM's evaluation process, including the provision of baseline information and an annual report; no confidential information will be required

4. MEMBERSHIP AND DUES

- A. All CPM State Chapter members must be NACPM members.
- B. The State Chapter has the authority to set its own state-level dues. All monies raised as State Chapter dues are the sole property of the State Chapter.
- C. NACPM has the authority to set and collect national NACPM dues; all monies raised by NACPM are the sole property of NACPM.
- D. NACPM will collect dues for national members, and state-level dues, if any. Under this arrangement, members who join NACPM will have the option of joining their State Chapter

simultaneously. NACPM will contribute \$25 to the State Chapter for every CPM member per year that also elects to join the State Chapter.

- E. NACPM will share information regarding all State Chapter members, including membership status, payment of dues and contact information on a quarterly basis or as requested by the State Chapter liaison.

5. COMMUNICATION AND USE OF NAME POLICY

- A. Every public statement issued by NACPM, or attributed to NACPM, shall be approved in advance by the Executive Director or President of NACPM or a designee.
- B. Any public statement issued by NACPM, or attributed to NACPM, must be in alignment with the mission, goals, philosophy and other core documents of the organization.
- C. The State Chapter must agree not to represent positions or viewpoints as being those of NACPM, other than those already contained within the NACPM Mission and Purpose, NACPM Essential Documents & Standards of Practice, or other written policies or work products, without express written permission from the NACPM Executive Director or Board President.
- D. Should the State Chapter wish to issue a policy or position that is not consistent with NACPM policies and positions, the State Chapter shall submit a request to NACPM for a waiver.

6. USE OF MEMBERSHIP INFORMATION AND MATERIALS

- A. NACPM and the State Chapter agree that national and state-level member information including, but not limited to, databases, lists, mailing labels and reports, may be used only in connection with the authorized, lawful business of NACPM or the State Chapter and be consistent with the terms of this Agreement, NACPM by-laws and NACPM policies.
- B. Member information is considered confidential and shall not be shared with, or available to, individuals or business entities outside of NACPM without the express, prior, written permission of the NACPM Executive Director.

7. ANNUAL STATE CHAPTER AGREEMENT RENEWAL

- A. This State Chapter Agreement is for the period of each calendar year during which it is signed and will be reviewed and renewed annually on or before January 1st, or at a time designated by the NACPM Executive Director.
- B. As part of its renewal, the State Chapter will provide an annual report to NACPM including:
 - Identification and contact information for current State Chapter leader(s)
 - Trends seen in membership (e.g., increased participation, member interests, needs)
 - Reflections on the State Chapters' progress, challenges and learnings in the prior year
 - Key policy or regulatory issues at the state level
 - Feedback on how to improve NACPM's offerings and the relationship between NACPM and the State Chapter

8. TERMINATION AND CONFLICT RESOLUTION

A. Either party can elect to terminate this Agreement:

- The State Chapter has the authority to terminate this Agreement and dissolve the State Chapter by communicating its decision to do so in writing to the NACPM Executive Director
- The NACPM Board of Directors has the authority to suspend or dissolve the State Chapter by revocation or non-renewal of this Agreement when it determines that: the State Chapter is no longer a viable entity; or the State Chapter is unable or unwilling to comply with the Agreement

B. NACPM and the State Chapter agree that any claim or dispute relating to this agreement, or any other matters, disputes, or claims, shall be subject to non-binding mediation prior to litigation.

9. APPLICABLE LAW

This Agreement shall be governed by the laws of the State of Massachusetts where NACPM is incorporated.

10. ENTIRE AGREEMENT

This Agreement contains the entire agreement of the parties. This Agreement supersedes any prior written or oral agreements between parties.

11. SEVERABILITY

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable.

12. POLICY ACKNOWLEDGMENT

NACPM State Chapter leaders have read and agree to comply with the NACPM State Chapter ethical conduct, conflict of interest, records retention and whistleblower policies.

NACPM Board President or Executive Director (print name)	Date

Signature

NACPM State Chapter Board Designated Representative (print name)	Date

Signature



Application Submission Process / Checklist

To apply as a NACPM State Chapter, **please contact us first** so that we can coordinate the process with you (admin@nacpm.org).

You will then be asked to submit the following information:

1. [Intention to Form Chapter](#) (electronic or paper filing acceptable)
2. State Chapter articles of incorporation
3. Documentation of tax exempt status or request to be included in NACPM's group ruling (\$200 fee to be included)
4. State Chapter by-laws
5. Confirmation of whether your Chapter wishes to be included in NACPM's Directors & Officers insurance coverage (\$100 fee) *or* documentation of independent insurance
6. Board Member Contact and Policy Acknowledgement Forms (Confirming all officers have read the following policies):
 - Conflict of Interest Form
 - Document Retention Policy
 - Leadership Guidelines for Ethical Conduct
 - Whistleblower Policy
7. Signed Chapter Agreement

Completed documents can be sent to NACPM via email to: admin@nacpm.org

Documents can also be mailed to:

National Association of Certified Professional Midwives
PO Box 340
Keene, NH 03431

Again, we are here to support your process and answer any questions you may have. Please don't hesitate to contact our Chapters Project Coordinator, Susan Smartt Cook, at chapters@nacpm.org or (423) 802-2177 if we can be of assistance.

Thank you!