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Introduction

Congratulations and thank you! You are a CASP affiliate leader! With leadership comes responsibility. The CASP Affiliate Leadership Manual is a resource that will help you throughout your term of leadership. This is your information base.

This manual is organized to help you understand meetings and ceremonies, as well as workshop development and public relations. The manual will explain the structure and duties of the affiliate as well as provide you steps in setting up a non-profit status for the affiliate to handle money. Last, the manual contains information about the nature and responsibilities of the CASP elected leadership and staff. These individuals will be valuable contacts for you as you fulfill your local leadership responsibilities.

This manual can also be used to create new affiliates. CASP’s goal is to establish new affiliates throughout the state, making it possible for every school psychologist in California to have the opportunity to join a local affiliate. Because of the far-flung geography of the state, this may not be possible. However, the CASP board sees the importance of local affiliates – for locally based continuing education, networking and as building blocks for future CASP leaders.

Congratulations from the CASP Board of Directors and staff on your new position. Make the most of your time in office. Act Now!
The Affiliates

In order to further the purposes of the Association as stated in the Bylaws, CASP encourages its members to form local associations throughout the state. When these local associations adopt purposes that are in concert with those of CASP and meet the criteria established in Policy 2100 of the Board Policy Manual, they may be granted charters as affiliates of CASP. For CASP Bylaws regarding Affiliates see Appendix A. CASP encourages its members to join the CASP Affiliate whose boundaries include the location of a member’s place of employment.

According to the CASP Bylaws (revised January 2014): An “Affiliate” is an organized association of members of the Association who hold a valid and unrevoked charter from this Association. A charter, for purposes of this section, is an instrument issued by authority of the Board, under seal, signed by the President and Secretary-Treasurer, authorizing the existence of an Affiliate and specifying its rights, privileges and duties.

The purposes of an Affiliate shall be to promote cooperation among the members, to provide a forum for meetings of members and participation in the affairs of the Association, to recruit and organize members, and to carry out the purposes of the Association at a local level.

Getting Started

Procedures for Applying for Affiliate Charters are found in Section 2100: Affiliate Associations of the Policy Manual. Those procedures are summarized below:

- The authority for granting Affiliate Association Charters rests with the CASP Board. The responsibility for assisting prospective Affiliates to organize and meet the criteria establishing an Affiliate, and for presenting requests for Affiliate charters to the Board rests with the appropriate Region Representative.

- The President of a prospective Affiliate presents a written request for an Affiliate charter to the appropriate Region Representative. This request shall be accompanied by the following documentation: adopted Constitution and/or bylaws, the school districts and/or county office of education that will serve as the geographic boundaries of the Affiliate, the names of all officers, and a current membership list, including address, phone number, place of employment, and CASP membership status for all members.

- Within one month of the receipt of the request and complete documentation listed above, the Affiliate Representative, in consultation with the CASP President, Region Representative for the prospective Affiliate, and the Executive Director, shall determine if the prospective Affiliate meets all the criteria. If the prospective Affiliate meets all the criteria, the Region Representative informs the Affiliate’s President, in writing, and presents the request for Affiliate charter to the CASP Board at its next regularly scheduled meeting. If the prospective Affiliate does not meet one or more of the criteria, the Region Representative shall inform its President, in writing, of which criteria are not met. The Region Representative shall report the status of the prospective Affiliate to the CASP Board at its next regularly scheduled meeting.
The Region Representative shall continue to assist the prospective Affiliate in meeting all the criteria. Other CASP officers, committee chairs, and staff may also be called on to support the Region Representative in this task. The Region Representative shall report the progress of the prospective Affiliate at every subsequent CASP Board meeting until a charter is granted or the request withdrawn, in writing, by the President of the group.

See Appendix B for suggestions to (re)vitalize an Affiliate.

Criteria for Granting Affiliate Charters

- The goals and/or purposes of the Affiliate, as stated in its Constitution and/or Bylaws shall be consistent with those of CASP (sample constitution/bylaws are included in this booklet).
- The Constitution and/or Bylaws of the Affiliate shall require that the President and President-Elect of each Affiliate be current members of CASP.
- The Constitution and/or Bylaws of the Affiliate shall endorse the CASP Code of Ethics and Professional Standards Manual.
- The Constitution and/or Bylaws of the Affiliate shall state that the Affiliate agrees not to claim the endorsement of CASP for any communication, action, or activity without the prior approval of the CASP Board.
- The Affiliate must evidence a willingness to participate in the regularly scheduled activities of CASP which are held for Affiliates, their officers and members.
- The Affiliate shall in no way restrict its potential members from joining other CASP Affiliates or any other professional organizations.
- The geographic location (school districts) of the Affiliate shall not conflict, nor overlap with existing Affiliates without the expressed consent of the members of the existing Affiliates and the CASP Board. Geographic boundaries are determined by school district and/or county boundary lines and may include more than one district or county.
- At least fifty-one percent (51%) of the Affiliate's regular members shall be members of CASP and the Affiliate is encouraged to maintain at least that percentage.
- All chartered Affiliates shall have their compliance with these criteria reviewed at least every five years by the appropriate Region Representative assisted by the CASP staff, with a subsequent report to the Board.

A sample charter and form to apply for Affiliate status is found in Appendix A.

After Starting an Affiliate

Now that your Affiliate has been established, here are a few events in which your Affiliate will wish to participate:

- Communication between the CASP Board and the Affiliate, as well as between the various Affiliates, is regarded by CASP as essential to the purposes of the Association. To facilitate this communication and promote the development of leadership at both local and state levels, the Affiliate Presidents, Region Representatives, and the Affiliate Representative meet periodically as an Affiliate Assembly. The primary goal of these assemblies shall be to provide a forum for
Affiliate officers to communicate directly with members of the CASP Board, to present their concerns and opinions, and to allow for direct dissemination of CASP board actions and concerns to the Affiliate leadership.

- The Affiliate meeting at the Fall Convention and Affiliate Leadership Days. The Fall meeting location is held in conjunction with the Annual Convention. Affiliate Leadership Days is typically held in Sacramento in January. The Affiliate Representative with the assistance of the Legislative Committee Chair and the President presides at the Affiliate Leadership Conference. Affiliate Presidents are encouraged to bring other Affiliate officers and leaders to these meetings.

Attaining non-profit status at a bank
For more information, https://www.irs.gov/charities-non-profits/application-for-recognition-of-exemption. See the appendix for more information about this status and setting up a checking account.

How CASP and Affiliates Work Together

The Affiliate is a sub-component of the California Association of School Psychologists. The Affiliate is chartered by CASP and members must belong to CASP. Consequently, special relationships exist between CASP and the local affiliate.

Affiliate Representative and Region Representatives
CASP maintains direct communication with Affiliate groups primarily through the two elected CASP officials, Affiliate Representative and the Region Representatives. The Affiliate Representative and Region Representatives work closely with local affiliate officers on issues of concern to both the general association and the local group. The representatives provide a valuable communication link between the CASP Board and the local groups. They contact local affiliate officers regularly to offer support and assistance on local needs and concerns, regarding Board activities or events. Both are very involved in advising and assisting Affiliates on a number of issues. The following are the duties of both, as described in CASP’s Bylaws and Policy Manual.

The Affiliate Representative shall act as liaison between the Board and the officers of the Affiliates. The Affiliate Representative shall:

- Serve as voting member of the Executive Board.
- Is elected to office by a vote of the Affiliates with confirmation by the CASP Executive Board. Nominations are made online each Spring, with an email vote held in May. Each affiliate has one vote. The Affiliate Representative is confirmed by the Executive Board during its June meeting (two-year term).
- Represent the Association when attending meetings of Affiliates.
- Preside at the annual affiliate Leadership Conference and the affiliate meeting at the annual convention and assign responsibilities as are deemed necessary to conduct the functions of the conference and the Convention meetings. In conjunction with the Executive Director, and with the approval of the President, plan and coordinate the program content and related speakers for both events.
- Maintain ongoing communication with Region Representatives to help coordinate activities and provide assistance on projects related to the affiliate groups as a whole.
• Serve on committees and task forces as appointed by the President.
• Encourage membership in the Association.
• Support and develop Affiliate leadership and communicate with the officers of assigned Affiliates on a regular basis.
• Encourage committee appointments at the Affiliate level.
• Recruit qualified candidates for the CASP Board.
• Contribute articles to CASP Today and Affiliate newsletters.
• Gather data about the membership, leadership and operations of assigned Affiliates, in consultation with the appropriate Region Representative.
• Help Affiliates build membership.
• Coordinate exchange of information, ideas and newsletters among assigned Affiliates.
• Support and assist in the granting of awards to the officers and members of assigned Affiliates.
• Coordinate an annual survey of Affiliate officers to gather information for potential topics of discussion at affiliate meetings and/or future projects.
• Coordinate the writing of an email report template of actions taken at each Board of Directors meeting. This template is then used by each Region Representative to tailor to his/her region. The email is then sent by CASP Staff to the membership in that Representatives’ region.
• Carry out such other responsibilities as may be assigned by the President or the Board.

Region Representatives act as Board representatives for the interests of the members in their respective regions of the state. They shall also serve as liaison between members, Affiliates and the Board in their respective regions, acting to facilitate communication in matters of mutual interest and concern to members of their regions. In addition, in their respective regions they:
• Serve as a voting member of the Executive Board.
• Are elected to office by regular members in good standing in their respective regions.
• Represent the Association in meetings with Affiliates, while serving as a liaison to Affiliates in his or her region. Communicate on a regular basis with Affiliate officers, and regularly attend Affiliate meetings.
• Facilitate and assist groups of members seeking to organize as an Affiliate. Identify new areas for the development of affiliates and provide assistance to local school psychologists to encourage this activity.
• Promote membership in CASP and Affiliates, and provide the Association with updates to the mailing list of Affiliate members who are not Association members.
• Provide assistance and support Affiliate officers in pursuit of various projects and activities.
• Encourage committee appointments at the Affiliate level (e.g. PAC, membership, etc.)
• Communicate on a regular and ongoing basis with the Affiliate Representative to coordinate local activities and address areas of concern to the Affiliate.
• Assist in recruiting qualified candidates for the Board.
• Contribute articles to CASP Today and Affiliate newsletters.
• Support and assist in the granting of awards to the officers and members of Affiliates.
• Provide support for the CASP awards and nominations processes.
• Provide liaison to specific committees as directed by the President.
• Carry out such other responsibilities as may be assigned by the President or the Board.

CASP Board Members who may work with Affiliates

President: Subject to the overall control of the Board, the President shall be the chief executive officer of the Association, and shall supervise, direct and manage the Association’s activities, affairs and other Officers and employees. The President shall preside at meetings of the members and of the Board, and shall be an ex-officio member of every committee. The President shall appoint all committee chairs, subject to ratification by the Board, and shall have such other powers and duties as may from time to time be prescribed in these Bylaws or by the Board.

President-Elect: The President-Elect shall preside at all meetings of members and of the Board which the President is unable to attend. The President-Elect shall also perform the other duties of the President during such time as the President is unable to do so, until the President is able to resume the duties of that office and so informs the President-Elect. In the event of a vacancy in the office of President, the President-Elect shall automatically succeed to the office of President. The President-Elect shall serve as a member of the Finance Committee, and be charged with tallying and announcing election results. The President-Elect will serve as the chair of the Personnel Committee and may have such other duties from time to time be prescribed by the Board. President-Elect is elected by the CASP regular members for the three-year term (President-Elect, followed by President and Past President).

Immediate Past President: The Immediate Past President shall endeavor to provide for a smooth and effective transition in the leadership, policies, activities and programs of the Association from year to year; shall act as Parliamentarian at meetings of Members and the Board; and shall have such other responsibilities as may from time to time be prescribed by the Board.

Secretary-Treasurer: The Secretary-Treasurer shall serve as both Secretary and chief financial officer of the Association. Any reference in these Bylaws to either the Secretary or the Treasurer shall mean the Secretary-Treasurer (two-year term).

CASP Office Staff
The CASP staff is available to work with Affiliates on a number of items. While the Executive Board determines policy and strategic direction of the Association, the staff to the Association is charged with implementing the policies and coordinating and helping to carry out the annual program of work. Staff is available to assist and work with leaders and members of affiliates on activities as necessary and/or requested. At present, the Association
is staffed with a combination of full- and part-time employees. These individuals are responsible for the following program areas and activities:

- **Executive Director:** Responsible for developing and implementing all association administrative policy, business operations, fiscal affairs, and general supervision of all Association activities. Association staff members report to the Executive Director. The Association Executive Director also serves as the Executive Director of the California School Psychology Foundation.

- **Communications Coordinator:** Responsible for the production/coordination of the Association’s publications – quarterly newsletter and all online publications – as well as, the development of all promotion/marketing material related to Association activities, such as the annual convention and Spring Institute program brochures, etc. Also is the content manager for the CASP website and administrator of the Association’s online presence – Facebook, Twitter, LinkedIn, etc. Supports the Executive Director and staff with special projects, as needed. (part-time position).

- **Lead Member Services:** Responsible for the coordination of member services including member recruitment campaigns, oversight of member-related data, and services and benefits to members. Member services is also responsible for data entry related to member records, coordination of new, renewed, and prospective member-related material and mailings. Works with the Executive Director to produce statistical reports and information on the membership, dues, special events and other items. Also responsible for the reception desk, duties and general office management, including in-house bookkeeping.

- **Member Services Coordinator:** Runs the CASP Continuing Education Program for Affiliates and other school-related organizations, produces contracts for CASP CEU events, and other general office duties. (part-time position).

- **Webmaster:** In charge of all technical aspects of the CASP website, including the online payments, web pages, videos, etc. Also assists where needed in the CASP office.

- **Graphic Artist:** Responsible for the design and development of all CASP printed materials. Works closely with the Communications Coordinator and the Executive Director (contractor).

- **Contract Lobbyist:** Assists in the planning and implementation of the Association’s governmental affairs program. The lobbyist works closely with the Chair of the Legislative Committee, the Executive Director and the President (contractor).

**Administrative Relationship**

The CASP office is responsible for a variety of organizational tasks vital to the health of the Association. CASP collects membership dues from members either monthly, through payroll deductions, or annually. These moneys, plus funds generated from the annual CASP convention and continuing professional development activities, are the basis for CASP’s annual income. Revenues are summarized in an annual budget, which is developed and approved by the CASP Executive Board. Expenditures are based on various expenses incurred from CASP’s member services and annual goals and priorities.
CASP staff is available to assist local affiliates in a variety of ways from contacting potential new members and locating speakers to address topics of interest, to providing information about CASP positions and policies.

Affiliate activities and organization are governed, broadly, under the parameters outlined in the CASP Board policies. These policies are general guidelines for such issues as membership, affiliate formation, officers required, and manners in which CASP and local groups work together. Outside of these general guidelines, local affiliates maintain great latitude in determining their needs and activities.

**Affiliates and the Annual Convention**

Each year, CASP sponsors an annual convention for the profession. The location of the convention varies each year in various areas of Southern California. The affiliate group/s in the location of the annual convention is usually very actively involved in helping to coordinate the event, and provides a large part of the volunteer staffing required to execute an event of this size. The local members work closely with the CASP staff to insure successful organization of the convention.

The convention provides an opportunity for affiliate members to receive updated information on CASP activities, network with other affiliate representatives and share information about local activities at the annual Affiliate meeting. All Affiliate officers in attendance at the Convention are invited to the meeting. CASP Executive Board members are present, and local affiliates have an opportunity to meet and discuss professional concerns directly with the elected officers.

**Affiliate Leadership Days**

Perhaps the most visible CASP function for affiliate groups is the Affiliate Leadership Days, which is typically held in January. This yearly meeting is a time when the CASP elected officers and staff join together with affiliate officers to discuss annual goals, present major issues within the profession, focus on special problems and concerns and network with other affiliate groups and members. This two-day event helps affiliates start the year with new, vital knowledge and experiences to help assure the best start to the school year. CASP has provided financial support for officers to attend when available, by covering some costs related to lodging/meals/materials.

**Continuing Professional Development**

CASP is licensed by the California Board of Behavioral Sciences to provide continuing education units to LCSWs, LMFTs, LEPs and LPCCs. It is also licensed to provide continuing education credits to Nationally Certified School Psychologists. Affiliates may offer CEUs to attendees of their workshops through CASP. Detailed information on this program is found in the Appendix of this Handbook.
Affiliate Board Meetings

Running a Board Meeting
Managing a board that effectively utilizes the time and talent of officers and others in attendance takes effort and patience (to get the process working smoothly). Here are a few tips to help you get up and running:

Parliamentary Authority
2. The president should try to project an air of impartiality during the board meetings. The president writes the agenda, which is his or her main influence to the outcome of the meeting.
3. Back room politics should be avoided. This can be very disruptive to group dynamics.
4. Use parliamentary procedure to increase efficiency of meeting:
   a. The President is responsible for seeing that the business of the affiliate is transacted in proper order and expedited as much as possible; that members observe the rules of debate; that order and decorum are always observed; that the rules of the affiliate are enforced with as little friction as possible. (From "Parliamentary Law" by Robert.)
   b. Call the meeting to order on time. If the first meeting of your term is called on time, the members will now they must be on time for future meetings. If the meeting does not quiet down when called to order, pause until order is restored.
   c. Recognize those who rise and address you by calling the name or signifying the member as recognized.
5. Have all committee reports and proposed motions turned in 2 weeks prior to the meeting.
6. Mail out agenda (with all proposed motions), committee reports and all background information one week prior to meeting.

At the board meeting:
1. No conversation is permitted unless there is a motion on the floor.
2. The president controls the floor. No one is permitted to speak until recognized by the chair.
3. The maker of a motion gets the floor first in order to explain the motion.
4. Each person is allowed 5 minutes to speak. A person who has already spoken cannot have the floor again until all that want to speak have had an opportunity.
5. Only two amendments can be on the floor at once (i.e. an amendment to amend the main motion and an amendment to amend the amendment).
6. Strictly alternate between pro and con comments. When there are no more differing comments, take the vote.
7. It is usual procedure to use a voice vote. Always ask for the no vote, even when it seems unanimous.
8. The president only votes in the case of a tie vote.
9. The president must pass the gavel (not preside over the meeting) in order to participate in the debate of an issue. When the gavel is passed, it cannot be returned until after the vote on that issue has been taken.

**Make Affiliate Meetings Work for the Affiliate**

Why Meet? No meeting can be successful unless it has a well-understood purpose and attainable goals. Your first undertaking will be to gather all the committee chairpersons and affiliate officers to decide just what you will try to accomplish with your meetings and special events during the coming year. The purpose of your meetings may be to educate, to conduct a business meeting, to elect officers, or to provide information and instruction. Many meetings have combined purposes, but there should be one, overall reason to have the gathering. Decide and proceed from there. Remember that whatever the purpose of your meeting, it should be a pleasant experience for those who attend.

A. Plan ahead. Inform all members about the meeting well enough in advance. Email agendas. State date, time and responsibility of each member of the meeting. Send reminders of action items.

B. Determine the best way to hold meetings (in person or otherwise) and how often (monthly, quarterly, before trainings) to keep board members active and accountable.

C. Physical arrangements. Consider the following when setting up the physical location of your meeting:
   1. Size of the group attending.
   2. Ventilation and temperature.
   3. Seating arrangements so all can see and hear.
   4. Control of lighting.
   5. Accessibility of the meeting place.
   6. Appropriateness of the meeting place for your group.
   7. Meal and/or event prices.

D. While planning the agenda, ask yourself these questions:
   1. What should be the purpose of each meeting? (The purpose should justify every meeting. It is a good idea to declare the purpose in the opening remarks.)
   2. How much can be handled in one meeting?
   3. What subject should be covered first in view of the overall objective?
   4. What should be the relationship between each meeting?
   5. Who are the program participants, officers, speaker(s), and entertainment?
   6. Has promotional material been carefully planned?

**Successful meetings**

A. Informality
   1. Use introductions to get everyone at ease and acquainted.
   2. Start and end meetings on time.

B. Make the group responsible and keep everyone busy.
   1. Presiding officer should be available with guidance and administrative know-how but let decisions be made and functions carried out by members and committees.
   2. Make first assignments simple enough to assure success then extend the responsibility.
   3. Provide proper training and written instructions for all that are to assume responsible assignments.
4. Keep attention focused on the purpose of the meeting.
5. Ask questions.
6. Questions start discussion.
7. Questions lead discussion into purposes of meeting.
8. Questions bring out different points of view.
10. Important issues can be resolved by converting them into questions, which will shed the light of truth.
11. Everyone participates in group discussions. Present all ideas and viewpoints as positive contributions.
12. Require ideas to be stated objectively and positively.
13. Rule out criticism.
14. Welcome bold ideas.
15. Stick to the subject. Use light signals if necessary. Red means “you are criticizing, explaining or off the subject”, green means “go ahead.”
16. Evaluate results of discussions and the meeting for the record, future direction and follow-up.

C. Props and equipment
1. Determine needs (AV, microphone, head table, etc.)
2. Assign responsibility for obtaining, setting up, operating, and returning all equipment.
3. Equipment should be properly set up and tested prior to use.

D. Develop and retain good member participation
1. Use reward or recognition of outstanding work done.
2. Point out relationship to total effect.
3. Stress importance of each person’s contribution to the whole.
4. Ensure success in the first project tries then increase responsibility.
5. Learn about each member’s strengths and elaborate upon them.
6. Encourage decisions.
7. Do not take any member for granted.
8. Discuss the developments in the organization to keep members well informed.

Making Motions

A. Business is accomplished at meetings by making motions.
B. Before members make a motion, have them write it. To make a motion, members rise and address the presiding officer. Members state: “I move that...”
C. After a motion has been seconded, the President will state the motion and will ask ‘Is there any discussion?’ The President will recognize the maker of the motion first if the maker wishes to speak. During debate, keep your seat and pay attention to the discussion.
D. After the motion has been debated or has been amended, the President puts the question to vote. “All in favor, say ‘aye’; opposed, say ‘no.’ Next the President states “The ‘ayes’ have it; the motion is adopted, and you have voted to do ...” or, “The noes’ have it and motion is lost.”
E. If the member making the motion sees that it does not seem to have the support of the members, there are several things he/she can do: 1) Request a recess: “Move that the President declare a ten-minute recess,” and try to convince members to vote for
the motion; 2) Refer the motion to a committee; 3) Postpone the motion to the next meeting.

F. The President is obligated to make motions perfectly clear. Always announce the result of the vote. A vote is not complete until the President announces it. The President should not recognize a frivolous motion. If a member makes a motion that is not in order, tell the member “Your motion is not in order at this time.”

G. Use general consent when it is possible. State “Is there any objection?” If there is an objection, put the motion to vote. If there is no objection, state, “The motion is adopted by general consent.”

H. It is the duty of every member to obey the rules of the affiliate, whether he/she approves of them or not; to try to further the objectives of the affiliate; to attend its meetings with reasonable regularity; to pay respect to its officers in their official capacity as its representatives; to abstain from acts or remarks outside of the meetings that will in any way interfere with the work being done by the officers or committees of the affiliate and by its authority; to pay attention to the speaker during debate and to the business in debate; to attend faithfully to any duty assigned, or ask to be excused. (From “Parliamentary Law” by Henry M. Robert.)

Sample Agenda for Affiliate Meetings

- A. Welcome and introductions: get members acquainted and at ease.
- B. Minutes: the first order of business is when the President calls for the reading of the minutes. He/she asks for corrections and then states, “The minutes are approved,” or “The minutes are approved as corrected.”
- C. Correspondence: pertinent correspondence (or a summary) is read by the secretary. If correspondence requires motions, they may be acted upon at this time, rather than to report under new business.
- D. Treasurer’s Report: next order of business is reading of the treasurer’s financial report, followed by discussion, if desired, and a statement from the President that the report will be filed. A formal motion of acceptance is not necessary.
- E. Committee Reports: standing and special committees will report and make recommendations, if any. Action on recommendations may be taken at this time or under new business.
- F. Unfinished Business: guided by previous minutes, the Secretary advises the President regarding unfinished business. If there is none, he/she so states. Action on unfinished business is processed by motion or resolution.
- G. New Business: subjects for discussion come from previous items on the agenda referred to new business or proposed at this time by members.
- H. Program: a speaker or other program, if any, is usually introduced at this time. Sometimes a guest speaker is introduced before the business part of the meeting so that he/she may speak and be excused before going into the rest of the agenda which may be of no interest to him/her.
- I. Announcements: prior to adjournment, the chair announces date, time and place of the next meeting, and other pertinent information, possibly including some brief inspirational message.
- J. Adjournment: By declaration, the President may adjourn the meeting if there is no further business. A motion is not necessary.
Promote Your Affiliate

Meetings & Special Events
A. One way for affiliates to promote their special events is through a monthly or quarterly newsletter. The newsletter is usually written by the newsletter editor with help from members of the Executive Board and others in the association. Reports on Affiliate meetings, events, member happenings and articles from other school psychology publications (with permission) may be included.
B. Flyers should be sent to Affiliate members to promote special events. Be sure to include date, time and place as well as the purpose of the event.
C. Websites are essential for promoting events and affiliate news. Several Affiliates also have sites that allow for event registrations and payments. Facebook, Twitter and/or email are also great ways to promote Affiliate events.
D. Email messages can be sent to regions through CASP. Contact your Affiliate’s Region Representative for information on sending a message to your region. Affiliates should also have records of email addresses of their membership.
E. CASP Today, CASP’s quarterly newsletter, is also available for Affiliates to publicize events and other news.

How to Find Speakers/Workshop Presenters
A. CASP has several Corporate Members. These are test publishing companies, universities and other groups with business interests in school psychology. They also frequently can arrange for guest speakers/trainers at little or no cost to the Affiliate. CASP has contact information for all corporate members.
B. CASP Conventions and Spring Institutes are excellent places make contact with potential speakers. Most presenters are happy to make time after their presentations if you make it clear that you would like to speak with them about a future presentation.
C. CASP Speakers’ Bureau is on the CASP website at http://casponline.org/about-casp/speakers-bureau/ This is a listing of trainers who have presented at CASP-sponsored continuing education events. This list is updated after each convention and at speakers’ requests. It includes updated emails for each speaker.
D. Please keep in mind that some speakers charge for presentations. You will have to take this into consideration when determining whether and how much to charge potential attendees for the workshop. Also take into account transportation, lodging, food, audio-visual rental and room rental when determining what to charge.
E. Once the subject matter for a presentation has been decided upon, the request for the speaker is usually made by phone or email (see prior section). As with any professional presentation, ample time is needed for sufficient preparation. Allow the speaker approximately 30 days from the time of request to the date of the meeting.
F. If the desired speaker is a member of the CASP Executive Board or staff, your request should be placed through the office of the CASP Executive Director. This enables the Executive Director to keep accurate schedules of the main engagements in which Executive Board members and staff is involved.
G. After the speaker has agreed to talk, a follow-up letter of speaker’s confirmation is sent to him/her from the affiliate. The first paragraph should thank him/her for accepting the invitation to speak at the affiliate meeting and provide the date of the
engagement and the topic of presentation. Thereafter, additional information should include the name and address of the meeting site, name of the room and anticipated size of the audience. Be sure to include the time the meeting will begin as well as when the speaker is expected to speak and the length of his/her presentation. Always allow for a 10-15 minute period for questions and answers.

H. It is customary to request background or biographical information so you may effectively publicize the presentation in your bulletin or newsletter and prepare your introduction of the speaker. Also, remember to ask if any assistance is needed with audio-visual equipment.

I. After the presentation has been delivered, a very nice gesture is to present the speaker with a Certificate of Appreciation.

J. Immediately following the date of the meeting, send a follow-up letter to the speaker, thanking her/him for sharing time with your affiliate.

K. Perhaps some of this seems incidental, however, speakers remember the little things and appreciate all the consideration you give them. It shows respect and professionalism that is expected from an affiliate.

Helpful Hints: You Must Delegate . . . Here’s How

A. Delegation is one of the hardest skills to develop, yet it is one of the most important. Too often, hard-working leaders believe that once they accept an assignment, they have to do all the work. To do otherwise, they think, is an abdication of responsibility. That just isn’t so. Associations, even more than other organizations, are built around the principle of teamwork, of people coming together to accomplish goals.

B. Delegation is an effective and efficient way to make sure you are spending your time on tasks that are important to you and your affiliate. Why does delegation work for you? It allows you to fully utilize the affiliate resources and expresses a vote of confidence in your members. By delegating, you don’t waste your efforts putting out yesterday’s fires or working on details that can be handled by others. Instead, you devote your energies to planning, directing and controlling the development of your affiliate.

C. By delegating, you make the best use of members’ interests and talents. Delegation motivates them. It gives them a broader view of what a project entails and a stake in the outcome. It allows those with particular expertise to use their talents and skills for the good of the affiliate. Delegation builds leadership skills in others that may be future leaders of the affiliate.

D. The basic principle of delegation is not “out-of-sight and out-of-mind.” It is a joint endeavor, a sharing of goals. The delegator acts as a guide, a sounding board, and a friendly critic without dominating or maintaining too much control. The delegator must be willing to have the assignee complete the project as he or she sees fit.

How to Delegate

1. Take stock of the situation. Ask yourself, “Am I really working on tasks that offer the biggest payoff to me and my affiliate?” If your answer is “no,” get ready to streamline your workload. Make a list of all the tasks you must do for a committee or project. Estimate how much time must be spent on each task. Rank the projects in
1. Order of priority. Delegate as much of the workload as you need to accomplish your highest priority items.

2. Find the right person for the job. Determine which of the tasks are best handled by affiliate officers and which are best handled by committee members. Administrative details, for example, should probably be assigned to officers. Other assignments should go to a member who not only has the appropriate training and experience but also a genuine interest in the subject or skill involved. If the task, for example, is writing a report, look for the person who is a closet poet. If it’s making a speech, look for the person who is comfortable behind the podium or who frequently tells stories before an audience at a social gathering.

3. Share all the important information. Explain your goals and objectives, what you feel needs to be done and how this particular project fits into the bigger picture of the affiliate’s work or projects. Make sure the assignment is understood. Watch for clues—such as a puzzled look or hesitation—that may mean a directive is not clear and should be restated. Discuss deadlines and quality and quantity you expect.

4. Don’t forget about the assignee. Follow up your face-to-face meeting with a memo that repeats the instructions and with a phone call that shows you care. Ask, “How is it going?” “Are you having problems?” “Do you have any questions?” Show a genuine interest, a willingness to help—but don’t become too involved or you will defeat the purpose of delegating. If appropriate, you may want to ask for progress reports.

5. Keep your hands off. Perhaps the hardest part of delegating is resisting the temptation to step in or take over. Sometimes a perfectly competent member may be slower than you would be at completing a task. Be patient. The assignee may not have as much energy or experience as you have—but that doesn’t mean he or she won’t do the job well.

6. Don’t forget to reward completion. Even if you simply say thank you, try to do so before others. This will boost the assignee’s ego, enhance his or her reputation and will set the stage for motivated performance in the future.

Appendix A

CASP Bylaws Regarding Affiliates

Article 4. Affiliates

Section 4.1. Definition. Members are encouraged to form local associations throughout the state, in compliance with these Bylaws. An “Affiliate” is an organized association of members of the Association who hold a valid and unrevoked charter from this Association. A charter, for purposes of this section, is an instrument issued by authority of the Board, under seal, signed by the President and Secretary-Treasurer, authorizing the existence of an Affiliate and specifying its rights, privileges and duties.

Section 4.2. Purposes. The purposes of an Affiliate shall be to promote cooperation among the members, to provide a forum for meetings of members and participation in the affairs of the Association, to recruit and organize members, and to carry out the purposes of the Association at a local level.

Section 4.3. Eligibility for Charter. Any group of members who desire to obtain a charter as an Affiliate of this Association may petition the Board in writing, specifying the
geographic territory which the proposed Affiliate is to include. No Affiliate may include any territory currently in the geographic area of another Affiliate; and the Board may in its discretion limit or alter the territory to be allocated to any Affiliate. After receiving permission to organize and approval of its geographic territory, but prior to receiving a charter, such group must draw up a roster of the names and addresses of its members (including CASP membership status and such other information as the Board may require), establish a meeting schedule and plan of action, adopt bylaws for the regulation of its affairs, adopt a budget for the conduct of its operations, elect officers, and take such other organizational steps as the Board may require, all in compliance with such policies and procedures as the Board may establish from time to time. The Board may establish requirements for the substance of Affiliate bylaws, or may in its discretion require each Affiliate to adopt and keep a standard form of bylaws established by the Board.

Section 4.4. Charter. When all organizational steps required by Section 4.3 have been taken to the satisfaction of the Board, and the proposed Affiliate is prepared to operate in compliance with applicable law, these Bylaws, the policies and procedures of the Association and sound business practice, the Association shall issue a charter to it. For as long as it remains in force, such charter shall confer upon the Affiliate and its members all the rights and duties contained therein and in these Bylaws. The provisions of every charter shall be deemed to include a requirement that the Affiliate operate in conformity with these Bylaws as amended from time to time.

Section 4.5. Affiliate Officers. Each Affiliate shall have a president, a president-elect (who may be designated the vice-president, but shall have the right of succession to the office of President), a secretary and a treasurer. An Affiliate may provide in its bylaws that one person hold the offices of secretary and treasurer. Only CASP Members in good standing may hold the office of president or president-elect in any Affiliate, and the bylaws of each Affiliate shall so provide.

Section 4.6. Term and Termination of Charter. A charter shall continue in effect from the date it is issued until it is surrendered or terminated. The members of an Affiliate may, by vote or written consent of a two-thirds majority of all such members, elect to surrender their charter. For noncompliance with the provisions of these Bylaws or the policies and procedures established by the Board, or for other good cause, and after notice and a reasonable opportunity for the officers of such Affiliate to be heard, the Board may terminate a charter. In the event of either surrender or termination of a charter, the Affiliate shall automatically and immediately cease being an Affiliate of the Association.

Section 4.7. Membership.

(a) Eligibility. Each member who works within the territory of an Affiliate, or for any other reason desires to belong to such Affiliate, may belong to it. Membership in an Affiliate shall not constitute any person a member of the Association. A person may belong to any number of Affiliates upon complying with the rules for membership in each and paying such dues as may be required by each. An Affiliate may also accept as members persons who are not members of the Association, but no such person may hold the offices of President and President-Elect.

(b) Membership Reports. Once each year the secretary of each Affiliate shall compile and send to the Association a complete roster of the names, addresses, workplaces (if any) and employment status of each board member of such Affiliate. If reasonably requested by the Association, each Affiliate shall poll its members to
learn their preferences or opinions about matters of legitimate concern to the Association, and tabulate and return such information to the Secretary.

Section 4.8. Dues. An Affiliate may set the dues for its members and require their payment on such terms as the Affiliate may determine.

Section 4.9. Affiliate Records. Each Affiliate shall keep accurate and complete minutes and records of the proceedings of its officers, committees and membership; accurate and complete financial records; and permanent files of its correspondence, contracts and other documents. All such records shall be retained for a minimum of five years. Each Affiliate shall file with the Secretary of the Association a true and complete copy of its bylaws as amended from time to time, its budget, its meeting schedule, and such other reports of the proceedings and activities of the Affiliate, its financial affairs and other information as the Board may reasonably require. The provisions of these Bylaws shall control any contrary provision in any Affiliate bylaws.

Section 4.10. Transition Provision. Any affiliate group that held a charter from the predecessor of the Association on the day the Association incorporated shall continue to hold a charter as an Affiliate after incorporation, without any further act by any party. The terms of such charter shall be deemed amended to conform with these Bylaws. Any Affiliate not willing to become an Affiliate of the Association may surrender its charter as provided above.
APPLICATION FOR CASP AFFILIATE CHARTER
(Sample)

1. Name of Proposed Affiliate: ________________________________

2. President of Proposed Affiliate:
   - Home Address: ________________________________________________
   - City/State/Zip: ________________________________________________
   - Telephone Number: ____________________________________________

3. Number of Members of Proposed Affiliate: ________________________
   - Number of members who are CASP members: ______________________
   - (Please attach membership roster.)

4. Please Attach Copy of Affiliate By-Laws.

5. It is the Affiliate’s Intention to Provide Service to the Following Areas/Districts:

________________________________________________________________

________________________________________________________________

________________________________________________________________

________________________________________________________________

________________________________________________________________

Signature of Applicant _______________________________ Date ____________

*A minimum of 51% of the affiliate’s regular members shall be members of CASP. (CASP’s Policies and Procedures Manual, Policy 2110-2115 enclosed.)

* * * * *

I have reviewed the documentation submitted by _______________________, spokesperson for the proposed Affiliate known as ________________________________ and verify the group’s qualifications for charter as an official Affiliate of the California Association of School Psychologists.

Signature of Region Representative: ________________________________

Presented to the Board on: _________________________________________

Affiliated Charter Granted on: _________________________________
Appendix C

SAMPLE AFFILIATE’S BYLAWS

Article I: Name
The name of the Association shall be (_____________fill in).

Article II: Purpose
The purpose of the organization shall be:

• To promote and advance quality education through the dissemination of information on educational issues and psychological research.
• To assist in the development of sound educational practices in the total school program.
• To provide a meaningful and effective in-service education program for the membership.
• To promote and adhere to the highest standards of ethics in the profession of school psychology.
• To provide channels through which those engaged in psychological services can discuss matters pertaining to the organization and administration of pupil services and the improvement of professional practices.

Article III: Membership

• Classes of membership within the Association shall include Regular, Associate, Student and Retired Members.
• These classes are defined as follows:
  o A Regular Member shall be a credentialed school psychologist.
  o An Associate member shall be a person in an allied field and not practicing as a school psychologist.
  o A Student Member shall be a person enrolled in a graduate-level training program in school psychology.
  o A Retired Member shall be a credentialed school psychologist who has retired.

Article IV: Membership Dues
Membership dues shall be determined by the Executive Board to include the amount and period covered.

Article V: Officers
Elected Officers: The elected officers of the Association shall be the President, President Elect, Past President, Treasurer and Secretary. Elected officers shall be members of the California Association of School Psychologists and the (location) Association of School Psychologists.

Duties of Elected Officers:
• President: the President shall act as chairperson of the Executive Board. The President shall be responsible for scheduling meetings of the Executive Board.
• President Elect: The President Elect shall serve as the presiding officer in the absence or incapacitation of the President. The President Elect shall also be responsible for scheduling non-Executive Board meetings for the Association.
• Past President: The Past President shall act as Parliamentarian for all Executive Board meetings.
• Treasurer: The Treasurer shall be responsible for overseeing the financial accounts of the Association and regularly reporting such information to the Board. The Treasurer shall also be responsible for the collection of dues and other fees.
• Secretary: The Secretary shall be responsible for dissemination of meeting announcements and other correspondence activities required.

Terms of Office:
The term of office for the President, President Elect, Past President, Treasurer and Secretary shall be one year commencing on July 1.

Article VI: Executive Board
The voting members of the Executive Board shall be the elected officers as described in Article V. Action shall be determined by a simple majority vote of the officers present.

Article VII: Meetings
Meetings shall include Executive Board meetings and membership meetings. The Executive Board shall meet at least once a month, excluding July and August, at a date and time to be determined by the President. The membership meetings shall be scheduled at a regular time each school month with the exception of the month in which the annual CASP convention is held. A quorum of the Executive Board shall be defined as one more than half of the elected officers.

Article VIII: Committees
Committees may be created by the Executive Board as needed. Committee membership shall be limited to Regular Members. Committee members will attend Executive Board meetings as requested.

Article IX: Election of New Officers
The Executive Board shall recommend a slate of candidates to the Regular Members for the offices of President Elect, Secretary and Treasurer. Approval shall be indicated by a simple majority vote. The ballot shall include spaces for write-in candidates. Only Regular Members may vote. The election shall take place in the month of May. The results of the election shall be announced at the final membership meeting of the year.

Article X: Office Vacancy
Should a vacancy occur before the expiration of an officer’s term, the Executive Board shall appoint a qualified replacement from its membership for the remainder of that term of office.

Article XI: Amendments to the Bylaws
These Bylaws may be amended or repealed by a majority vote of the Regular Members voting. Notice of such changes shall be sent in writing to the Regular Members at least 30 days prior to the close of such election. Changes may be proposed by the Executive Board on its own initiative or by petition to the Executive Board by at least 5 percent of the
Regular Members. The Executive Board shall present all such proposed changes to the Membership with or without recommendation.
Appendix D

CASP Policy Manual regarding Affiliates

ELECTING THE AFFILIATE REPRESENTATIVE

II. For the office of Affiliate Representative:
   A. Each Region Representative, Affiliate Representative, and Affiliate President who is a Regular Member in good standing shall be polled for input on candidates for the position of Affiliate Representative. A written memo, from the President-Elect, shall be forwarded to each eligible individual with the names and qualifications of each candidate. Eligible individuals shall be asked to make a recommendation for one (1) candidate only.

   B. If a Region Representative or Affiliate Representative also serves as an Affiliate President, or if an Affiliate President is not a Regular Member of the Association in good standing, the Affiliate President polling memo shall be completed by another affiliate officer who is a Regular Member of the Association in good standing. The descending order of precedence for affiliate officers other than president to receive the polling memo shall be: President-Elect, Past-President, Secretary/Treasurer. If none of these officers are Regular Members of the Association in good standing, the Association President-Elect, in consultation with the Association President, Executive Director, and Affiliate President, shall select a previous affiliate officer who is an Association Member in good standing to complete the Affiliate President’s polling memo.

   C. All polling information shall be forwarded to the Association President who will make a recommendation to the Board of Directors for appointment to the office of Affiliate Representative. The appointment must be ratified by the Board of Directors.

Nominees shall be notified of election results by the President-Elect no later than three weeks after the annual Convention. General membership shall be notified of the results and the newly elected officers will be introduced in the Spring issue of CASP Today. Ballots and tallies shall remain on file for inspection at the Association office for a period of one year.
Appendix E

CASP: THE ASSOCIATION

I. Organizational Background
   A. Founded in 1953 and located in Sacramento, the California Association of School Psychologists (CASP) is the statewide membership organization for school psychologists in California. With a membership of about 2,000, CASP is the largest statewide organization of school psychologists in the nation and the strongest voice for psychologists practicing in California’s schools. In addition to providing liaison with various state boards and commissions, CASP actively represents the profession before legislative audiences, governmental officials, and other policy-making bodies. The Association provides continuing professional development to the membership through Region training programs and an annual convention. Publications of the Association include a quarterly magazine and an annual research journal.
   B. The CASP membership is comprised of individuals who work in school districts, and in private practice throughout the state, helping school personnel — teachers, administrators, and counselors — support student education and solve related learning, social, and adjustment problems. Working, also, with parents of students, school psychologists link homes, classrooms, and school systems to promote the mental health, learning, and welfare of California’s children and youth.

II. Governance Structure
   A. Executive Board: The Association’s governance structure is reflected in a 15-member Executive Board and an appointed slate of committee chairs and members who, together, complete the Board of Directors. The Executive Board is charged with policy making for the organization and takes input and recommendations from committee chairs and the executive director. Members of the Executive Board are elected officers with the responsibility and authority to vote on matters presented to the Board of Directors.