



Affiliate Leadership Manual

September 2021 Revision

California Association of School Psychologists

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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 get started, understand meetings and ceremonies, as well as workshop development and public relations. The manual will explain the structure and duties of the affiliate and provide you steps in setting up as an “unincorporated association” 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. 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 CASP'S *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, as shown below.

According to the CASP 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.

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.



CREATING AN AFFILIATE

GETTING STARTED

Procedures for Applying for Affiliate Charters are found in the Affiliate Associations section of the CASP 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 at least 20 prospective members), 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 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.

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 manual).
- The Constitution and/or Bylaws of the Affiliate shall require that the President and President-Elect of the 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 from CASP.
- 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 required to maintain at least that percentage.
- All proposed affiliate board members must be CASP members.

All chartered Affiliates shall have their compliance with these criteria reviewed at least every three years by the appropriate Region Representative, assisted by the CASP staff, with a subsequent report to the Board. Review will include an update of any amended bylaws, membership compliant with 51% CASP membership requirement (checked against CASP membership database), and board compliant with 100% CASP membership requirement. At the beginning of each year, each affiliate should send its member list and board list to CASP.

A sample charter and form to apply for Affiliate status are found in Appendices B and C. Once your charter is approved, you will need to take the following further steps to formally create your Affiliate.

Sample forms for the following described filings are all found in the Appendices. The fillable .pdf files can be requested from the CASP office. The samples in the Appendices are partially completed, with areas highlighted to be completed with information unique to your Affiliate.

FILING WITH THE STATE OF CALIFORNIA

Once your charter has been accepted by CASP, you will first need to create an entity (think of this as having a baby - an entity, separate from yourself must be forced into existence). There are many types of entities - for our purposes, you will want to create an "Unincorporated Association" by filing with the State of California. After acceptance of your charter by CASP, your affiliate will need to file two forms with the Secretary of State to create an unincorporated association. CASP staff is available to assist with these forms if needed.

1. [Registration of Unincorporated Nonprofit Association](#) form, attached as Appendix D.
2. [Statement by Unincorporated Association](#), attached as Appendix E.

When your officers change, or every five years (whichever is sooner) your Affiliate will need to re-file the [Statement by Unincorporated Association](#) with the Secretary of State. Failure to

file with the Secretary of State at least every five years will lead to the dissolution of your Association, it is therefore imperative that you have a system in place to ensure the filing is properly and timely completed.

OBTAINING AN EMPLOYER IDENTIFICATION NUMBER

Now that your entity exists, you will need to obtain an Employer Identification Number (think of this like getting a social security number for your new baby). The EIN will be required in order for your affiliate to open a bank account. Just as children cannot use their parents' social security numbers, affiliates are not able to use CASP's EIN - they must have their own. You must file your Association Registration and Statement (described above) with the Secretary of State before you seek an EIN. The EIN is obtained through the IRS; be cautious, there are many online services that will charge you for obtaining an EIN - these services are not legitimate. An EIN can be obtained directly from the IRS for no fee. Visit the [IRS website](#) to apply for your EIN online. A sample completed EIN application can be found in Appendix F.

OPENING A BANK ACCOUNT

Your Affiliate should have a bank account in the Affiliate's name, with at least two officer's names on the account. **Affiliate funds should not be managed through personal bank accounts**; this practice is risky not only for the affiliate (which could lose funds to unscrupulous or deceased individuals) but also to the individual receiving the funds (who could be liable for taxes on the funds). You must create your unincorporated association and secure an EIN before attempting to open a bank account.

Many banks offer free accounts to nonprofit organizations, including US Bank and F&M Bank. As a caution, some banks have provisions where the account will freeze if they do not have direct transactions (not counting recurring direct withdrawals) within a 12 month period. When you go to open your account, you will need your EIN, filed Registration of Unincorporated Nonprofit Association, filed Statement by Unincorporated Association, a copy of your Bylaws, and any other documentation the bank requests. Often, the bank will request a resolution or letter from the Affiliate's Board of Directors that authorizes designated individuals to open a bank account in the Association's name; it is a good idea to adopt such documents at a Board meeting before attempting to open a bank account. CASP staff is available to assist with this process if needed.

SECURING TAX EXEMPTION

Now that you have created your association (had a baby), obtained an EIN (got a social security number), and opened a bank account, you will also need to think about income taxes. Although your Affiliate is a nonprofit, unless you take the steps below, it will still be required to pay taxes. In other words, your affiliate is **not** automatically exempt from taxes, you must ask the IRS and FTB to exempt it. Your affiliate may be subject to state and federal taxes and penalties if this process is not followed.

THE IRS

First, you will want to apply for tax-exempt status with the IRS as a 501(c)(6) organization. This process will exempt your Affiliate from paying federal income taxes. This is accomplished by filing [IRS Form 1024](#). A sample is found in Appendix G. Form 1024 must be accompanied by [Form 8718](#), also shown in Appendix G. There is a \$600 filing fee. The IRS typically takes 4-6 months to process these applications, but you can operate your affiliate while the IRS is processing. Your affiliate will not be considered a nonprofit until after the IRS has processed your application, this may cause delays in setting up various accounts. Once your application has been reviewed, you will receive a letter from the IRS. Some correspondence will require a response within a designated time period; be careful to regularly check mail at the address you give the IRS. CASP staff is available to help with this process if needed.

THE FTB

After the IRS grants your exempt status, you will need to file [FTB Form 3500A](#). A sample is found in Appendix H. This process will exempt your organization from paying state income taxes.

ANNUAL TAX FILINGS

Once you have completed the process above, your Affiliate will be exempt from paying Federal and State income taxes; however, it must still file an annual tax return. The form to use varies depending on your Affiliate's income each year. If your Affiliate has under \$50,000 in income each year, it is eligible to file short, simple forms with both the IRS and FTB. If your Affiliate has more than \$50,000 income in any given year, contact the CASP office for additional guidance. To file these forms, you will need to know your annual revenue for the prior year.

The IRS Form 990-N must be filed annually online at the [IRS website](#).

The FTB Form 199N must be filed annually online at the [FTB website](#).

INSURANCE

The final step in forming your Affiliate is to consider obtaining insurance. Although it is not required, it is a good practice to consider obtaining [Director's & Officers insurance](#).

When holding events, you will sometimes be required to provide proof of liability insurance in order to secure a meeting location. CASP is usually able to provide liability insurance for your events; contact our office for more information.

OPERATING YOUR AFFILIATE

FINANCIAL MANAGEMENT

At least two of your Affiliate's current Board members, ideally the President and Treasurer, should be listed as signers on the bank account at all times.

The Treasurer should prepare, and present to the Board for review and formal approval, regular financial reports. This practice protects both the Affiliate and the signers on the bank account. A sample Treasurer's Report can be found in Appendix I.

Your affiliate should have an annual budget, which will help your board make sound decisions and guide activities. The budget should be drafted by the Treasurer, then presented to and approved by the board. A sample budget can be found in Appendix J.

MEMBERSHIP MANAGEMENT

The information in this section targets effective ways to manage members, both active and inactive. Before getting started, you will need a mailing address (one dedicated for the Affiliate is preferred) and a business bank account. Some affiliates opt to open a P.O. Box at a location that is in a central location to board members. Having these things set up allows for the membership dues to be sent to a physical location or deposited into an account.

TYPES OF MEMBERSHIP

There are four types of membership for most affiliates: Student, Associate, Regular, and Retiree. Some affiliates also have a First Year School Psychologist membership that has the same membership due as the student membership.

- Student membership is for students that are those that are enrolled in a college or university.
- Associate membership is for those that are not school psychologists, but are in an allied field (e.g., LEP, MFT, LCSW).
- Regular membership is for active school psychologists practicing within the field.
- Retiree membership is for those that practiced within the field or in an allied profession and are now retired.

FREE MEMBERSHIP MANAGEMENT OPTIONS

One way to get started with member registration and payments is using Google Forms and Sheets and an Online Payment Platform for dues payment in addition to check or PO payments coming by mail.

- Create a Google Form for Membership Registration: see Appendix K for a sample.

- A Membership List (a Google Sheet) will be generated from the Google Form responses
- You will have to cross-check payments to make sure everyone has paid dues
- Allow members to pay dues via online payment platform, cash/check, or PO
 - Document payments on Membership List spreadsheet
 - Make sure someone is checking the mail regularly

There are a variety of online payment platforms that your Affiliate can use to accept online payments. Two common ones are [PayPal](#) and [Square](#). Like the bank account, payment accounts need to be set up in the Affiliate's name and using the Affiliate's EIN; personal names and social security numbers should not be used. As with the bank account, if personal information is used the affiliate risks losing the funds and the individual risks being liable for income taxes on the funds. For these reasons, peer-to-peer payment systems like Zelle and Venmo should not be used (these services only allow sending of money between people, not between people and organizations).

You will need to connect your digital payment platform to your Affiliate bank account. PayPal is probably the most common online payment platform and can be integrated into a Google Site.

PAID MEMBERSHIP MANAGEMENT OPTIONS

WILD APRICOT (BEST CHOICE!)

This is a paid, inclusive, web-based membership management program for associations. It mostly is a "set it and forget it" type of system. This is a great option for Affiliates who are growing and have steady income (or are new and want to try it out). In addition to managing your members, Wild Apricot also provides a website (see website section for more information).

The fees for this option are based on how many contacts you have. You can pay per month or annually with a discount. If your affiliate has 50 or fewer contacts, the service is FREE but *does not* provide all features like online payments and has limited storage. Otherwise, the fee is \$40/month or \$432/year for 100 contacts (this is the better option starting out if your Affiliate can afford it).

All features mentioned below are set up "behind the scenes" in the administration panel and integrate into the built-in website that you can design and tweak to your liking. All screenshots are of the membership management section of the administration panel. There are multiple levels of administration access that can be granted (i.e. membership chair only given access to the membership section and cannot edit the webpage design or create/edit events).

In terms of membership management:

- You will set up the membership levels and dues for each, when membership renews, options for partial year dues, etc.
- There are lots of options and settings to go through, but, once it's set, it's done forever until you want to change!

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Membership level list

| Name Type | Renewal period | Membership fee | Automatic recurring payments | Public can apply | Member can change to |
|--|---|----------------|------------------------------------|------------------|--|
| Associate Member  Individual | Every 1 year (starting from July 1st) | \$30.00 (USD) | No | Yes | Regular Member Retired Member Student Member |
| Regular Member  Individual | Every 1 year (starting from July 1st) | \$30.00 (USD) | No | Yes | Retired Member |
| Retired Member  Individual | Every 1 year (starting from July 1st) | \$20.00 (USD) | No | Yes | Associate Member Regular Member |
| Student Member  Individual | Every 1 year (starting from July 1st) | \$20.00 (USD) | No | Yes | Associate Member Regular Member |

General

Renewal policy

New applications

Level info

Name

Regular Member

Type

☒ Individual
 ☐ Bundle

☐ Limit to members
 ☐ Unlimited


Membership fee


30.00 USD

Taxes


☐ Use tax scope settings (disabled)
 ☐ Apply taxes
 ☒ Disable taxes

Level security options

☒  Public can apply

☒  Member can change to:

☐ Associate Member
 ☒ Retired Member
 ☐ Student Member

 Please note: members will be billed the full price of the new membership term. All **refunds** must be done **manually**.

Payment can be through Wild Apricot's native platform OR with 3rd party apps like PayPal (some docs have to be submitted for the Wild Apricot payment platform and fees differ when using a 3rd party app).

Invoices for membership are generated automatically

- All transactions/finances are tracked automatically overall and there is record of a member's payment history
- Membership lists are created automatically, are easily searchable, and an “at a glance” view is provided (e.g. membership numbers broken down by membership category and active/inactive status)

| Level | Total | Active | Renewal overdue | Lapsed | Pending | | New in last | | |
|------------------|------------|------------|-----------------|-----------|----------|----------|--------------|----------|----------|
| | | | | | New | Renewal | Level change | 7 days | 30 days |
| Associate Member | 4 | 1 | 3 | 3 | - | - | - | - | - |
| Regular Member | 183 | 141 | 41 | 37 | 3 | 2 | - | - | - |
| Retired Member | 6 | 6 | - | - | - | - | - | - | - |
| Student Member | 15 | 13 | 4 | 2 | - | - | - | - | - |
| Total | 208 | 161 | 48 | 42 | 3 | 2 | - | - | - |

You can easily email members through Wild Apricot.

- Communication can be easily targeted to particular groups, member type, or other group (e.g. board members, student members, etc.) that you create.

Transitioning to or starting with Wild Apricot does require some additional learning and time to set up. The self-serve help guide and live support are *really* good and easy to use.

MASS COMMUNICATIONS

The information in this section targets organizing and delivering event promotions, reminders to renew membership, and informational blasts.

HOW TO COMMUNICATE WITH MEMBERS

- Wild Apricot – can be used to create websites, membership sign-ups, send event reminders and receipts for trainings, links to CASP
- WordPress – can be used to create websites, links to CASP
- Google Forms – can be used to create membership lists, create registrations, volunteer interests, feedback, surveys
- Facebook – can be used to attach membership sign-ups, advertise positions and trainings, advertise help needed within the affiliate

- Newsletters - some affiliates have newsletter they send to members
- Create a Social Media and Marketing/Chair position to be in charge of website, swag, social media

CONTACT GLOSSARY

- Wild Apricot - membership platform that assists with tracking membership and stores member information. However, this is a fee-based program if you have more than 50 members, as described above.
- Google Sheets – may be used to assist with keeping track of dues paid, keeping track of event registrations and fees.

SYSTEMS FOR MEDIA BLASTS

Email

Many affiliates use email as a primary means of information to send blasts. If you are sending emails using this modality, you may want to highlight the names that are tracked from a google/excel spread sheet and paste them in the BCC section. Doing this allows each member to receive messages without seeing the other members' emails and prevents unnecessary reply-all chains.

- If the list is not maintained, then you may receive many bounce-back emails.
- G-Suite, add tags to emails as they come and go to specific people, e.g., sends a message to membership chair.

Wild Apricot may be used to send and coordinate media blasts.

Social Media

- Facebook - Many affiliates create their own affiliate Facebook pages that allow for members to communicate with them directly. This allows members to see event posts and communicate with affiliates directly through the messenger application.
- Instagram – Several affiliates also utilize Instagram to post information regarding affiliate events or giveaways. There are also several affiliates who use IG to post inspirational or funny Memes or infographics that align with initiatives being targeted by the affiliate.
- Twitter - Several affiliates have created a Twitter handle and use it facilitate conversations or to support broader discussions or activism through hashtags.
- LinkedIn- LinkedIn may be used a platform to promote events.
- Be sure to connect with CASP's social media accounts for information sharing.

Text/ SMS or Messaging Applications

- Some affiliates may opt to send messages to affiliate members regarding events or membership renewal.

- There are messaging applications such as WhatsApp that also allow for this type of communication. Be sure members have a way to opt-in and out of text communications.

Utilizing CASP to Assist with Advertising of Events

If you have an event that you would like to have broadcasted to either those in your region or others throughout the state, you may email CASP and they can assist with this process. This may include posting it to the CASP event page or sending out an email blast.

- Region Rep blasts occur after board meetings or when there is information that needs to be communicated to members within your region. It serves to update members of critical CASP information or events. These blasts are “digest” blasts, in that they cover a wide range of useful information. CASP does not send out individual email blasts for affiliate events.
- CASP Today Newsletters - CASP Today newsletters have a section that allows for upcoming events to be highlighted. Your event may be promoted in this area.
- Website – CASP lists affiliate events on the events page of its website. CASP regularly posts a link to the events page on its social media channels.

Swag

SWAG is merchandise that has the affiliate’s name and/or logo on it.

- Can be helpful as a communication tool. When people see the swag, they can inquire about their local affiliate and may grow to be more involved.
- Some affiliates use Cafe Press or Zazzle as their swag vendor.

PLANNING AND EXECUTING EVENTS

The information in this section targets tools and information that would be helpful for planning and executing events.

Some affiliates have large events at the beginning of the year to generate funds. Longevity of and strength of board members really helps. Recruiting board members who have natural interests in the areas that they are in charge of is also helpful.

[Click here for a Google Drive folder of event resources.](#)

EVENTS

Virtual Events

With COVID-19 the ability to host and desire to have virtual events expanded. Many affiliates now choose to have virtual events or hybrid events as an option. Conducting a virtual event also allows for those who belong to other affiliates to participate.

- WIX - Website builder that allows for the ability to pay for events and for all be integrated for events and for memberships (recurring option) for members potentially too. All of this is within their website. Linked PayPal and Square account.
- CASP makes its Zoom account available for affiliate use on a first-come, first-served basis. Check your CEU contract with CASP for more details.

In-Person Events

Delineate roles to board members at the board meeting before an event. It is helpful for each board member to have an assigned duty during each event.

When you host an in-person event, there are helpful items that may assist with the event. Many affiliates have created a checklist that works for their specific affiliates. You may want to consider the options below:

- Plastic bins - label for easy set up/break-down
- Swag - sell physical swag affiliate merchandise and push online store
- Pens - stylus pens are a hit!
- Printouts of slides
- Square card reader
- Coffee
- Cups
- Food
- Restroom Signs
- Sign-in Sheet

Pre-plan who will manage specific things the day of (set up, CEUs, swag sales, handouts, sign-in, membership recruitment, raffles, break down, etc.).

Socials

These are events that are specifically for networking. They are helpful for collaboration within the field and are a great way for incoming school psychologists to have face time with practicing school psychologists.

- Consider holding an affiliate Social immediately following a large training. This assists with allowing members to debrief, share thoughts, and network.
- Consider raffling off prizes at the social (memberships and swag).
- Appetizers are typically paid for by the affiliate during the social.
- Some affiliates make the Region Outstanding School Psychologist of the year announcement at the social.

EVENT PLANNING CALENDAR

Many affiliates struggle with knowing how many events to host and when to host them.

- Strive to have 3 affiliate events a year

- Strive to make your planning calendar by April/May of previous year for the next year

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 events are excellent places to 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 periodically updated. It includes email addresses 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. You may be able to partner with another affiliate to afford a speaker who charges a fee.
- 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 Board or staff, your request should be placed through the CASP Executive Director. This enables the Executive Director to keep accurate schedules of the main engagements in which Board members and staff are 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. It is also a good idea to have the speaker sign a contract; a sample speaker contract can be obtained from the CASP office for this purpose.
- 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.
- L. If you would like to offer CEU/CPD for the workshop, refer to your affiliate's CEU/CPD agreement with CASP for specific requirements and timelines that must be met.

RECEIVING PAYMENTS FOR EVENTS

Invoices

- Create invoices through Google Drive. Many Google document templates for invoices are available online.
- Consider using Mailmerge within Word - this will print one document for each person that is needed. Excel can be used for Mail Merge, as well. You are able to import the names from Excel and create them for everyone.
- Invoices should include:
 - The affiliate's name and mailing address
 - The invoice date and number
 - The name and address of the customer
 - A description of the item being purchased, including training title and date
 - If the district is paying, also list the attendee name(s)
 - Payment information, if options other than mailing a check are available

A sample invoice from VCASP can be found in Appendix L or accessed via [Google Sheets](#).

A sample receipt from VCASP can be found in Appendix M.

Eventbrite

EventBrite can be used to manage event registration. Make a page on [Eventbrite](#) and there is a description and add pricing (members, non-members, students, etc). Money is collected through the site and three days after it transfers to the bank account. There is a fee, but many affiliates factor it into the cost (so affiliate does not pay the fee).

Some affiliates opt to send a letter to districts created by Affiliate District Representatives that break an event cost down by percentage of individuals that would need to attend for a specific fee (e.g., 50 individuals attending would be \$50 per person, 100 individuals attending would be \$30 per person).

District fees allows them to show the discounted reduced fee and helps reduce invoices.

Purchase Orders

- Some affiliates don't allow for it, others try to do it
- Need to have a w-9 on file with school district to become a vendor

- Many also require a specific insurance for an event

Tracking Paid Registrants

Some affiliates track fees by membership (e.g., members would get a reduced event cost). Although this may boost membership, depending on the tracking system in place, this may make it more difficult to track.

Using Google Forms or another web tracking system to help with this.

- Check Google Forms Excel Spreadsheet and cross reference.
- A sample Google Form for registration can be found in Appendix N.

GENERAL HELPFUL TIPS

- Expand events to non-school psychs. Consider teachers and like professions.
- Consider offering a reduced event rate fee for Districts/SELPA's that will guarantee to pay for a large percentage of their district staff to attend (e.g., 80%+).
- Consider partnering with other Affiliates or co-sponsor with a local district in your region to co-host events (speaker fees/travel costs etc.).
- Board members advertise affiliate membership at affiliate events. They also advertise for affiliate events at district meetings.

PROMOTING 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 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 or emails 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. CASP lists affiliate events on its website; they can be submitted for listing by emailing the Executive Director.
- 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.

WEBSITES

The information in this section pertains to building and maintaining a website and how to make the website work for the affiliate (e.g., allows for registering for events, signing up for membership, purchasing swag).

When you create a website, or if you change to a new website, please be sure to let CASP staff know to update the [listing on the CASP website](#).

BUILDING A WEBSITE

Affiliates can take different approaches to building and maintaining their websites. Affiliates can either build and maintain a website in house, or contract with someone to do a website for them. Here are some examples:

- EGRASP: built membership group, developed newsletters, and reached out to friends and members to see if they knew anyone who could help develop website. Connected with an independent contractor to build and maintain website. President is the point person to communicate with contractor.
- BAASP: not sure who built but it's been maintained internally by Board member
- OCASP: maintained internally by Board member
- If building and maintaining site is completed by Board member, it is a voluntary position. Conflict of interest if payment is offered to a Board member or close relative of a Board member.

CASP's webmaster is available to assist affiliates with websites, as an independent contractor in his non-CASP-time. He can be contacted via email to joshjohnsonph@me.com [do not use this email for CASP related business, only if you are interested in hiring him for website assistance].

MAINTAINING A WEBSITE

Like building a website, affiliates have the option of maintaining websites themselves or hiring someone to do so.

If your affiliate decides to contract out for website maintenance, here are some things to consider:

- The contract with web developer should include additional costs for extra tweaks.
- Typical/average cost for maintaining a website
 - EGRASP pays \$300/ year to have website maintained by independent contractor
 - Pay for domain name: host through Google, GoDaddy, Wild Apricot

Here are some things to consider in the website maintenance process:

- Typical/average cost for maintaining a website
 - May depend on number of members, length of contract, etc.
- Create board position as web developer/maintaining website.
- Have links to social media to websites that the affiliate has created (e.g., Instagram, Facebook, Twitter).

Here are some ways you can make your website work for you:

- Registering for events and signing up for membership: consider the fees of using payment processors such as Paypal, Squarespace, etc. Be sure to set up notifications to Treasurer and a direct link on website.
- Purchasing swag: your affiliate can purchase and maintain an inventory of SWAG, or use a drop-shipping service. Your affiliate should weigh the costs vs interests of purchasing swag, and consider:
 - Who will maintain inventory and shipping?
 - How will it be listed on the website?
 - Can you outsource?
 - Should SWAG be for everyone, or just members?

WEBSITE PLATFORMS

If you are creating and maintaining a website yourself, here are a few platform options. If you are hiring someone, discuss with them your best option.

Snowball

- FREE with restricted access to some features.
- Has capacity to register for events and membership; funds go directly into bank account.
- \$400 annual for full access.
- Customer service line.
- Consider and negotiate group rate for other affiliates signing up.

Google Sites

- Google Sites is a great no cost platform that affiliates can use to make a website.
- Here are some tutorials that will assist in orienting you on the process.
 - <https://youtu.be/OsNat-3-D3s>
 - <https://youtu.be/5BhCVvFWetE>

Wildapricot

- Annual fee for membership management, website, and events.
- Funds can go directly into bank account. Discussed in detail in the Membership section.

[WordPress](#)

- WordPress is a popular, relatively understandable platform for websites. Advanced features integrate with PayPal, social media, and other platforms.
- Price ranges from \$0 – 45 per month.

CASP EVENTS

Here are a few CASP 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. Assemblies will be held at least four times per year, counting Affiliate Day and the fall Affiliate leadership meeting. Additionally, the Affiliate Representative is available to attend Affiliate events and board meetings, and provide support to affiliates on an as-needed basis.
- The fall Affiliate leadership meeting, held in conjunction with the Annual Convention. The purpose of this meeting is to gather affiliate leaders and share best practices for affiliate success. Affiliate Presidents are encouraged to bring other Affiliate officers and leaders to these meetings.
- Affiliate Leadership Days is typically held in July or August. The purpose is to orient new leaders to the business of running an affiliate and the support CASP is able to offer. 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 event helps affiliates start the year with new, vital knowledge and experiences to help assure the best start to the school year.

COLLABORATING WITH OTHER AFFILIATES

Other affiliate leaders can be a great resource for helpful tips on how to manage Affiliate matters, inclusive of committees, meetings, finances, and recruitment. For this reason, CASP promotes the connection of Affiliate leaders through the events highlighted above. In addition, a list of contact information for Affiliate leaders can be found [on the CASP website](#).

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.

Consider holding a board orientation session at the start of the year. A helpful tool for this orientation session is the [Board Orientation Workbook](#) (download the file “The Board Orientation Workbook Jan 2021 FINAL”) by Bob Harris. Several other board resources are available on his website, nonprofitcenter.com. The knowledge gained in the orientation session will help your affiliate and its meetings function smoothly.

[Click here for a Google Drive folder of board resources from other affiliates.](#)

[Click here for a Google Drive folder of meeting resources from other affiliates.](#)

PARLIAMENTARY AUTHORITY

1. Robert’s Rules of Order Newly Revised - Using Robert’s Rules allows for a free exchange of ideas and still facilitates efficiency.
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 know 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. E-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.

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. Also, remember to invite the CASP Affiliate Representative.
- 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.
 - a. Questions start discussion.
 - b. Questions lead discussion into purposes of meeting.
 - c. Questions bring out different points of view.
 - d. Questions bring out facts.
 - e. Important issues can be resolved by converting them into questions, which will shed the light of truth.
 2. Everyone participates in group discussions. Present all ideas and viewpoints as positive contributions.
 3. Require ideas to be stated objectively and positively.
 4. Rule out criticism.
 5. Welcome bold ideas.
 6. Stick to the subject. Use light signals if necessary. Red means "you are criticizing, explaining or off the subject", green means "go ahead."
 7. Evaluate results of discussions and the meeting for the record, future direction and follow-up.
- B. 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.
- C. Develop and retain good member participation
 1. Use reward or recognition of outstanding work done.
 2. Point out relationship to total effect.
 3. Stress the importance of each person's contribution to the whole.
 4. Ensure success in the first project, 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 they approve 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: the 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.

HOW CASP AND AFFILIATES WORK TOGETHER

The Affiliate is a component of CASP. The Affiliate is chartered by CASP, and its entire board of directors and half of its members must also belong to CASP. Consequently, special relationships exist between CASP and the local affiliate.

AFFILIATE REPRESENTATIVE AND REGION REPRESENTATIVES

CASP maintains direct communication with affiliates primarily through the two elected CASP officials, the Affiliate Representative and respective Region Representatives. The Affiliate Representative and Region Representatives work closely with local affiliate officers on issues of concern to both CASP and the Affiliate. The representatives provide a valuable communication link between the CASP Board and the Affiliates. 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 Policy Manual.

AFFILIATE REPRESENTATIVE

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

- A. Serve as member of the [CASP] Board.
- B. Represent the Association [CASP] when attending meetings of Affiliates.
- C. Preside at the annual affiliate leadership meetings and assign responsibilities as are deemed necessary to conduct the functions of the meetings. In conjunction with the Executive Director, and with the approval of the President, plan and coordinate the program content and related speakers for affiliate leadership events.
- D. Maintain ongoing communication with Region Representatives to help coordinate activities and provide assistance on projects related to the affiliate groups as a whole.
- E. Serve on [CASP] committees and task forces as appointed by the President.
- F. Encourage membership in the Association [CASP].
- G. Support and develop Affiliate leadership and communicate with the officers of Affiliates on a regular basis.
- H. Encourage participation in CASP committees by Affiliate leaders.
- I. Recruit qualified candidates for the CASP Board.
- J. Contribute articles to *CASP Today* and Affiliate newsletters.
- K. Gather data about the membership, leadership and operations of Affiliates, in consultation with staff and the appropriate Regional Representative.
- L. Help Affiliates build membership.
- M. Coordinate exchange of information, ideas, and newsletters among Affiliates.
- N. Support and assist in the granting of awards to the officers and members of Affiliates.
- O. Coordinate an annual survey of Affiliate officers to gather information for potential topics of discussion at affiliate meetings and/or future projects.
- P. Carry out such other responsibilities as may be assigned by the [CASP] President or the Board.

REGION REPRESENTATIVES

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, they:

- A. Serve as a member of the [CASP] Board.
- B. Represent the Association [CASP] in meetings with Affiliates, while serving as a liaison to Affiliates in their region. Communicate on a regular basis with Affiliate officers and regularly attend Affiliate meetings.
- C. 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.
- D. Promote membership in CASP and Affiliates, and provide the Association with updates to the list of Affiliate members who are not Association members.
- E. Provide assistance and support Affiliate officers in pursuit of various projects and activities.
- F. Encourage participation in CASP committees by Affiliate leaders.
- G. Communicate on a regular and ongoing basis with the Affiliate Representative to coordinate local activities and address areas of concern to the Affiliates.
- H. Assist in recruiting qualified candidates for the [CASP] Board.
- I. Contribute articles to *CASP Today* and Affiliate newsletters.
- J. Support and assist in the granting of awards to the officers and members of Affiliates.
- K. Provide support for the CASP awards and nominations processes, including promoting awards and reviewing nominations for the Nadine Lambert Outstanding School Psychologist Award.
- L. Provide liaison to specific committees as directed by the President.
- M. Carry out such other responsibilities as may be assigned by the [CASP] President or the Board.

CASP BOARD MEMBERS

At times, other CASP board members will be available to work with affiliates as needed.

President: CASP's President is responsible for overall supervision of CASP's activities. The President works closely with the Affiliate Representative to ensure Affiliate's needs are met.

President-Elect: CASP's President-Elect supports the President as needed, and succeeds the President following their term as President-Elect.

Immediate Past President: CASP's Immediate Past President serves as a mentor to the President and assists as needed.

Secretary-Treasurer: CASP's Secretary-Treasurer is responsible for overseeing CASP's records and financials and can be a resource to Affiliates as needed.

CASP STAFF

The CASP staff is available to work with Affiliates on a number of items. While the Board of Directors determines policy and strategic direction of the Association, the staff is charged with implementing 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. Any non-routine requests for staff assistance should be made to the Executive Director, not to individual staff members. 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 Executive Director is available to assist affiliates with operational issues.
- Membership & Communications Coordinator: Responsible for the production/coordination of the Association's publications – quarterly newsletter and all online publications – as well as 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 social media presence – Facebook, Twitter, LinkedIn, etc. Supports the Executive Director and staff with special projects, as needed. The Membership & Communications Coordinator will regularly work with Affiliate leaders to promote affiliate events and provide affiliate updates in CASP Today.
- Education Associate: Runs the CASP Continuing Education Program for Affiliates and other school-related organizations, produces contracts for CASP CEU/CPD events, and other general office duties. The Associate is available to help Affiliates with any and all questions regarding CEU/CPD hours. Works with the Executive Director to produce statistical reports and information on events and other items.
- Webmaster: In charge of all technical aspects of the CASP website, including the online payments, web pages, videos, etc. The webmaster is responsible for updates to the Affiliate page on the CASP website; Affiliates should send the webmaster updates if their website changes.

ADMINISTRATIVE RELATIONSHIP

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 CASP's 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 Southern California. The affiliate group/s in the location of the annual convention is/are 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 Board members are present, and Affiliates have an opportunity to meet and discuss professional concerns directly with the elected officers.

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 by contracting with CASP. This program is managed by the staff Education Associate in accordance with the required contracts.

FINANCIAL SPONSORSHIP

Affiliates often ask how they can support CASP. Affiliate support is a vital part of CASP's ongoing operations. All contributions can be made by mailing a check to the CASP office. Please indicate the specific item you would like to support on your check:

- Sponsoring the annual convention or spring institute (make check payable to California Association of School Psychologists).
- Donating to the Foundation (make check payable to California School Psychology Foundation). The Foundation has three funds that receive donations:
 - Paul Henkin Memorial Scholarship Fund: Provides up to \$750 for a student and a first-year school psychologist to attend convention
 - Cultural and Linguistic Diversity Scholarship: Provides \$1,000 to a culturally / linguistically diverse school psychology student
 - Minigrants / General Fund: Provides up to \$1,500 for minigrants to working school psychologists. Also covers general expenses, like tax return preparation and filing fees.
- Making a general contribution to CASP (make check payable to California Association of School Psychologists).

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.

APPENDIX B: APPLICATION FOR AFFILIATE CHARTER



APPLICATION FOR CASP AFFILIATE CHARTER

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.

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 CHARTER/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

- At least fifty one percent (51%) of the Association's members shall also be members of the California Association of School Psychologists. (CASP).
- Classes of membership within the Association shall include Regular, Associate, Student and Retired Members.
- These classes are defined as follows:
 - A Regular Member shall be a credentialed school psychologist or Licensed Educational Psychologist.
 - An Associate member shall be a person in an allied field and not practicing as a school psychologist.
 - A Student Member shall be a person enrolled in a graduate-level training program in school psychology.
 - A Retired Member shall be a credentialed school psychologist or Licensed Educational Psychologist who has retired.

Article IV: Membership Dues

Membership dues shall be determined by the 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 Board. The President shall be responsible for scheduling and conducting meetings of the 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-Board meetings for the Association.
- Past President: The Past President shall serve as an advisor and 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 keeping minutes of Board meetings, 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: Board

The members of the 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 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 Board shall be defined as one more than half of the elected officers.

Article VIII: Committees

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

Article IX: Election of New Officers

The 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 in June.

Article X: Office Vacancy

Should a vacancy occur before the expiration of an officer's term, the Board shall appoint a qualified replacement from its membership for the remainder of that term of office.

Article XI: Affiliation with CASP

This Association is an independent legal entity, separate from CASP and every other Affiliate of CASP, subject only to the express terms and conditions of affiliation stated in this charter and in the CASP Bylaws and Policies and Procedures. As such, this Association is fully responsible for its own debts, liabilities, and other obligations, and any creditor of this Association shall look only to the assets of this Association for payment, and not to CASP, nor to any other affiliate of CASP, nor to any individual member of this association or CASP.

The Articles of Incorporation and Bylaws of CASP, as they may be amended, shall govern this affiliate and all other affiliates. This association shall adopt no policy and shall take no action in conflict with the Articles of Incorporation, Bylaws of CASP, or any Policy and Procedure of CASP as they may be amended.

Article XII: Fiscal Year

The fiscal year of this Association shall be July 1 through June 30.

Article XIII: Amendments to the Bylaws

These Bylaws may be amended or repealed by a majority vote of the Regular Members voting. No amendments may be made which conflict with the Articles of Incorporation, Bylaws, and Policies and Procedures of CASP. Prior to a vote of the Association's members, proposed revisions shall be submitted to CASP for review. 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 Board on its own initiative or by petition to the Board by at least 5 percent of the Regular Members. The Board shall present all such proposed changes to the Membership with or without recommendation.

Article XIV: Legal Status and Dissolution

This Association is an unincorporated association formed solely for the purposes described in Section II. This Association is not legally affiliated with any company, agency, or special interest group from which this Association may draw its individual members. The use of the

funds of this Association shall be limited to the purposes described in Section II; they may not be used for the benefit of any individual.

In the event of dissolution of this Association distribution of any funds, after payment of any indebtedness, shall be made either by contribution to CASP, the California School Psychology Foundation, or by contribution to another CASP Affiliate, or some combination thereof.

APPENDIX D: REGISTRATION OF UNINCORPORATED NONPROFIT ASSOCIATION

State of California Secretary of State

REG. NO. _____

REGISTRATION OF UNINCORPORATED NONPROFIT ASSOCIATION PURSUANT TO CALIFORNIA CORPORATIONS CODE SECTION 21300

Instructions:

1. Complete and mail to: Secretary of State, Document Filing Support Unit,
P. O. Box 944225, Sacramento, CA 94244-2250 (916) 657-5448
2. Include filing fee of \$10.00 per box checked below.

This space For Filing Use Only

Association includes any lodge, order, beneficial association, fraternal or beneficial society, historical, military, or veterans organization, labor union, foundation, or federation, or any other society, organization, or association, or degree, branch, subordinate lodge, or auxiliary thereof.

Registration For:

☒ Name ☐ Insignia ☐ Alteration ☐ Cancellation

Association Name

Street or Mailing Address

City and State

Zip Code

Nature of Alteration (If Any):

Description of Insignia, which may include badge, motto, button, decoration, charm, emblem, or rosette:

Attach Facsimile:

I declare under penalty of perjury under the laws of the State of California that I am a chief officer of the association; that I am authorized to act on behalf of the association with respect to completing and submitting this application; that the information contained in this application is true and correct.

Signature of Officer

Date

Signature of Additional Officer (Optional)

Date

Typed Name and Title

Typed Name and Title

Sec/State Form LRB/UNA 128 (Rev. 03/2005)



Mail Submission Cover Sheet

Instructions:

- Complete and include this form with your submission. **This information only will be used to communicate with you in writing about the submission.** This form will be treated as correspondence and will not be made part of the filed document.
- Make all **checks or money orders** payable to the Secretary of State.
- Do not include a \$15 counter fee when submitting documents by mail.
- Standard processing time for **submissions** to this office is approximately 5 business days from receipt. All **submissions** are reviewed in the date order of receipt. For updated processing time information, visit www.sos.ca.gov/business/be/processing-times.

Optional Copy and Certification Fees:

- If applicable, include optional copy and certification fees with your submission.
- For applicable copy and certification fee information, refer to the instructions of the specific form you are submitting.

Contact Person: (Please type or print legibly)

First Name: _____ Last Name: _____

Phone (optional): _____

Entity Information: (Please type or print legibly)

Name: _____

Entity Number (if applicable): _____

Comments: _____

Return Address: For written communication from the Secretary of State related to this document, or if purchasing a copy of the filed document enter the name of a person or company and the mailing address.

Name: [_____]

Company: _____

Address: _____

City/State/Zip: [_____]

| Secretary of State Use Only | |
|-----------------------------|----|
| T/TR: | |
| AMT REC'D: | \$ |

Doc Submission Cover - OBE (Rev. 09/2016)

[Clear Form](#)

[Print Form](#)

APPENDIX E: STATEMENT BY UNINCORPORATED ASSOCIATION

Instructions for Completing the Statement By Unincorporated Association (Form UA-100)

Where to File: For easier completion, this form is available on the California Secretary of State's website at www.sos.ca.gov/business/be/forms.htm and can be completed online and printed to mail. The completed form can be mailed to Secretary of State, Document Filing Support Unit, P.O. Box 944225, Sacramento, CA 94244-2250 or delivered in person (drop off) to the Sacramento office. If you are not completing this form online, please type or legibly print in black or blue ink. This form is filed only in the Sacramento office.

Legal Authority: Statutory filing requirements are found in California Corporations Code section 18200. All statutory references are to the California Corporations Code, unless otherwise stated.

- After the Statement by Unincorporated Association has been filed, the association may at any time file a new statement superseding the last previously filed statement. If the new statement does not designate an agent for service of process, the filing of the new statement operates to revoke a process agent previously designated.
- The Statement by Unincorporated Association expires 5 years from December 31 following the date of filing with the Secretary of State, unless previously superseded by the filing of a new statement.

Fees: The fee for filing the Statement by Unincorporated Association is \$25.00. A non-refundable \$15.00 special handling fee is applicable for processing documents delivered in person (drop off) at the Sacramento office. The preclearance and/or expedited filing of a document *within a guaranteed time frame* can be requested for an additional non-refundable fee in lieu of the special handling fee. For detailed information about preclearance and expedited filing services, go to www.sos.ca.gov/business/be/service-options.htm. The special handling fee or preclearance and expedited filing services are not applicable to documents submitted by mail. Check(s) should be made payable to the Secretary of State.

Copies: Upon filing, we will return one (1) uncertified copy of your filed document for free. To get additional copies, include a separate request and payment for copy fees when the document is submitted. Copy fees are \$1.00 for the first page and \$.50 for each additional page. For certified copies, there is an additional \$5.00 certification fee, per copy.

Complete the Statement by Unincorporated Association (Form UA-100) as follows:

- Item 1.** Enter the name of the unincorporated association.
- Item 2.** If the unincorporated association has a principal office address in California, enter the complete address, including zip code, and proceed to Item 4 (leave Item 3 blank.) If the unincorporated association has no principal office address in California, leave Item 2 blank and proceed to Item 3.
- Item 3a.** If the unincorporated association has no principal office in California, enter the complete address of the unincorporated association to which the Secretary of State shall send any notices required under Sections 18210 and 18215.
- Item 3b.** If different from Item 3a, enter the mailing address of the unincorporated association.
- Item 4.** An agent for service of process **may** be designated by the unincorporated association if the association has a principal office address in California, and **must** be designated by the unincorporated association if the association has no principal office address in California. The person named as agent must be a resident of California or a corporation that has filed a certificate pursuant to Section 1505. If an individual is designated as agent, both Items 4 and 5 must be completed. If a corporation is designated, complete Item 4 and proceed to Item 6 (do not complete Item 5). An Agent for Service of Process is an individual or corporation designated by an unincorporated association to accept service of process if the unincorporated association is sued.
- Please note:** An unincorporated association cannot name itself as agent for service of process. Further, no domestic or foreign corporation may file pursuant to Section 1505 unless the corporation is currently authorized to engage in business in California and is in good standing on the records of the Secretary of State.
- Item 5.** If an individual is designated as the agent for service of process, enter the agent's business or residential address in California. Please do not enter "in care of" (c/o) or abbreviate the name of the city. Please do not enter an address if a corporation is designated as the agent for service of process.
- Item 6.** If the unincorporated association filed a previous statement, enter the file number issued by the Secretary of State. If the last statement filed by the association has expired, or no prior statements have been filed, leave Item 6 blank and proceed to Item 8.
- Item 7.** If the unincorporated association filed a previous statement under a name other than the name entered in Item 1, enter the former name of the association exactly as it is of record with the Secretary of State. If the name has not changed, or the last statement filed by the association has expired, or no prior statements have been filed, leave Item 7 blank and proceed to Item 8.
- Item 8.** Type or print the name and title of the person completing this form.



**State of California
Secretary of State**

Statement By Unincorporated Association
(Corporations Code section 18200)

A \$25.00 filing fee must accompany this form.

IMPORTANT – Read instructions before completing this form.

This Space For Filing Use Only

| | | | |
|---|--|---|----------------|
| Entity name | | | |
| 1. Name of Unincorporated Association | | | |
| Principal Office Address in California, if any (If any, in Item 2 list the street address of the association's principal office address in California and proceed to Item 4 (leave Item 3 blank.) If the association has no principal office address in CA, leave Item 2 blank and proceed to Item 3a.) | | | |
| 2. Street Address of Principal Office in CA | | City | State Zip Code |
| | | CA | |
| Street & Mailing Addresses (If Item 2 was not completed, in Item 3a list the association's complete street address to which the Secretary of State shall send any required notices and, if different from Item 3a, in Item 3b list the association's mailing address.) | | | |
| 3a. Street Address of Unincorporated Association | | City | State Zip Code |
| | | | |
| 3b. Mailing Address of Unincorporated Association, if different from Item 3a | | City | State Zip Code |
| | | | |
| Agent For Service of Process (If Item 2 was completed, the association may designate an agent for service of process. If, however, Item 3 was completed, the association must designate an agent for service of process. If the agent is an individual, the agent must reside in California and both Items 4 and 5 must be completed. If the agent is a corporation, the agent must have a certificate pursuant to California Corporations Code section 1505 on file and Item 4 must be completed (leave Item 5 blank).) | | | |
| 4. Name of Agent for Service of Process | | | |
| 5. If an individual, Street Address of Agent for Service of Process in CA | | City | State Zip Code |
| | | CA | |
| Amended Filing (If the unincorporated association filed a previous statement with the Secretary of State, enter the Secretary of State file number in Item 6, and if the name under which the unincorporated association previously filed differs from the name entered in Item 1, enter the former name of the unincorporated association in Item 7. If the last statement filed by the association has expired, or if no prior statements have been filed, leave Items 6 and 7 blank and proceed to Item 8.) | | | |
| 6. Secretary of State File Number | | | |
| 7. Former Name of Unincorporated Association (if different from the name in Item 1 above) | | | |
| Execution | | | |
| 8. The information contained herein is true and correct. | | | |
| Signature of Person Completing This Form | | Type or Print Name and Title of Person Completing This Form | |
| | | | |
| UA-100 (REV 01/2013) | | APPROVED BY SECRETARY OF STATE | |

Clear Form

Print Form

The agent for service of process is the person to whom paperwork would be delivered if a lawsuit was filed against the Affiliate. This can be CASP's executive director or the Affiliate President.

APPENDIX F: EMPLOYER IDENTIFICATION NUMBER APPLICATION

| | | | | | |
|--|---|--|--|--|--|
| Form SS-4 (Rev. December 2019) Department of the Treasury Internal Revenue Service | | Application for Employer Identification Number (For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.) ▶ Go to www.irs.gov/FormSS4 for instructions and the latest information. ▶ See separate instructions for each line. ▶ Keep a copy for your records. | | OMB No. 1545-0003 EIN | |
| 1 Legal name of entity (or individual) for whom the EIN is being requested | | | | | |
| Type or print clearly. | 2 Trade name of business (if different from name on line 1) | | 3 Executor, administrator, trustee, "care of" name | | |
| | 4a Mailing address (room, apt., suite no. and street, or P.O. box) | | 5a Street address (if different) (Don't enter a P.O. box.) | | |
| | 4b City, state, and ZIP code (if foreign, see instructions) | | 5b City, state, and ZIP code (if foreign, see instructions) | | |
| | 6 County and state where principal business is located | | | | |
| 7a Name of responsible party | | | 7b SSN, ITIN, or EIN | | |
| 8a Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | | 8b If 8a is "Yes," enter the number of LLC members | | |
| 8c If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | |
| 9a Type of entity (check only one box). Caution: If 8a is "Yes," see the instructions for the correct box to check. | | | | | |
| <input type="checkbox"/> Sole proprietor (SSN) <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (enter form number to be filed) ▶ <input type="checkbox"/> Personal service corporation <input type="checkbox"/> Church or church-controlled organization <input checked="" type="checkbox"/> Other nonprofit organization (specify) ▶ Uninc. Association <input type="checkbox"/> Other (specify) ▶ | | | | | |
| <input type="checkbox"/> Estate (SSN of decedent) <input type="checkbox"/> Plan administrator (TIN) <input type="checkbox"/> Trust (TIN of grantor) <input type="checkbox"/> Military/National Guard <input type="checkbox"/> State/local government <input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government <input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises | | | | | |
| 9b If a corporation, name the state or foreign country (if applicable) where incorporated. State: Foreign country: | | | | | |
| 10 Reason for applying (check only one box) | | | | | |
| <input checked="" type="checkbox"/> Started new business (specify type) ▶ Unincorporated Association <input type="checkbox"/> Banking purpose (specify purpose) ▶ <input type="checkbox"/> Changed type of organization (specify new type) ▶ <input type="checkbox"/> Purchased going business <input type="checkbox"/> Hired employees (Check the box and see line 13.) <input type="checkbox"/> Created a trust (specify type) ▶ <input type="checkbox"/> Compliance with IRS withholding regulations <input type="checkbox"/> Created a pension plan (specify type) ▶ <input type="checkbox"/> Other (specify) ▶ | | | | | |
| 11 Date business started or acquired (month, day, year). See instructions. | | | | | |
| 12 Closing month of accounting year June | | | | | |
| 13 Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14. | | | | | |
| Agricultural 0 Household 0 Other 0 | | | | | |
| 14 If you expect your employment tax liability to be \$1,000 or less in a full calendar year and want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$5,000 or less in total wages.) If you don't check this box, you must file Form 941 for every quarter. <input type="checkbox"/> | | | | | |
| 15 First date wages or annuities were paid (month, day, year). Note: If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year) | | | | | |
| 16 Check one box that best describes the principal activity of your business. | | | | | |
| <input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing <input type="checkbox"/> Health care & social assistance <input type="checkbox"/> Wholesale-agent/broker <input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale-other <input type="checkbox"/> Retail <input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance <input checked="" type="checkbox"/> Other (specify) ▶ Professional association | | | | | |
| 17 Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided. Continuing education | | | | | |
| 18 Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | | | | |
| If "Yes," write previous EIN here ▶ | | | | | |
| Third Party Designee | Complete this section only if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form. | | | Designee's telephone number (include area code) | |
| | Designee's name Address and ZIP code | | | Designee's fax number (include area code) | |
| Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete. | | | | Applicant's telephone number (include area code) | |
| Name and title (type or print clearly) ▶ | | | | Applicant's fax number (include area code) | |
| Signature ▶ | | | | Date ▶ | |

This is the date your Registration of Unincorporated Association was filed by the Secretary of State.

APPENDIX G: IRS FORM 1024

| | | |
|---|---|---|
| Form 1024 (Rev. January 2018) Department of the Treasury Internal Revenue Service | Application for Recognition of Exemption Under Section 501(a) ▶ Go to www.irs.gov/Form1024 for instructions and the latest information. | OMB No. 1545-0057 If exempt status is approved, this application will be open for public inspection. |
|---|---|---|

Read the instructions for each Part carefully. **A User Fee must be attached to this application.**
 If the required information and appropriate documents are not submitted along with Form 8718 (with payment of the appropriate user fee), the application may be returned to the organization.
Complete the Procedural Checklist that follows the form.

Part I. Identification of Applicant Must be completed by all applicants; also complete appropriate schedule. Submit only the schedule that applies to your organization. Do not submit blank schedules.

Check the appropriate box below to indicate the section under which the organization is applying:

- a ☐ Section 501(c)(2)—Title holding corporations (Schedule A)
- b ☐ Reserved for future use
- c ☐ Section 501(c)(5)—Labor, agricultural, or horticultural organizations (Schedule C)
- d ☒ Section 501(c)(6)—Business leagues, chambers of commerce, etc. (Schedule C)
- e ☐ Section 501(c)(7)—Social clubs (Schedule D)
- f ☐ Section 501(c)(8)—Fraternal beneficiary societies, etc., providing life, sick, accident, or other benefits to members (Schedule E)
- g ☐ Section 501(c)(9)—Voluntary employees' beneficiary associations (Parts I through IV and Schedule F)
- h ☐ Section 501(c)(10)—Domestic fraternal societies, orders, etc., not providing life, sick, accident, or other benefits (Schedule E)
- i ☐ Section 501(c)(12)—Benevolent life insurance associations, mutual ditch or irrigation companies, mutual or cooperative telephone companies, or like organizations (Schedule G)
- j ☐ Section 501(c)(13)—Cemeteries, crematoria, and like corporations (Schedule H)
- k ☐ Section 501(c)(15)—Mutual insurance companies or associations, other than life or marine (Schedule I)
- l ☐ Section 501(c)(17)—Trusts providing for the payment of supplemental unemployment compensation benefits (Parts I through IV and Schedule J)
- m ☐ Section 501(c)(19)—A post, organization, auxiliary unit, etc., of past or present members of the Armed Forces of the United States (Schedule K)
- n ☐ Section 501(c)(25)—Title holding corporations or trusts (Schedule A)

| | |
|--|--|
| 1a Full name of organization (as shown in organizing document) | 2 Employer identification number (EIN) if none, see Specific Instructions |
| 1b c/o Name (if applicable) | 3 Name and telephone number of person to be contacted if additional information is needed |
| 1c Address (number and street) | Room/Suite |
| 1d City, town or post office, state, and ZIP + 4. If you have a foreign address, see Specific Instructions for Part I. | |
| 1e Web site address | 4 Month the annual accounting period ends June |
| 5 Date incorporated or formed | |

6 Did the organization previously apply for recognition of exemption under this Code section or under any other section of the Code? ☐ Yes ☒ No
If "Yes," attach an explanation.

7 Has the organization filed Federal income tax returns or exempt organization information returns? ☐ Yes ☒ No
If "Yes," state the form numbers, years filed, and Internal Revenue office where filed.

8 Check the box for the type of organization. ATTACH A CONFORMED COPY OF THE CORRESPONDING ORGANIZING DOCUMENTS TO THE APPLICATION BEFORE MAILING.

- a ☐ Corporation— Attach a copy of the Articles of Incorporation (including amendments and restatements) showing approval by the appropriate state official; also attach a copy of the bylaws.
- b ☐ Trust— Attach a copy of the Trust Indenture or Agreement, including all appropriate signatures and dates.
- c ☒ Association— Attach a copy of the Articles of Association, Constitution, or other creating document, with a declaration (see instructions) or other evidence that the organization was formed by adoption of the document by more than one person. Also include a copy of the bylaws.

If this is a corporation or an unincorporated association that has not yet adopted bylaws, check here ☐

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization, and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

PLEASE SIGN HERE

| | | |
|-------------|---|--------|
| (Signature) | (Type or print name and title or authority of signer) | (Date) |
|-------------|---|--------|

For Paperwork Reduction Act Notice, see instructions. Catalog No. 12343K Form **1024** (Rev. 1-2018)

This is the date your Registration of Unincorporated Association was filed by the Secretary of State.

Part II. Activities and Operational Information (Must be completed by all applicants)

- 1** Provide a detailed narrative description of all the activities of the organization—past, present, and planned. Do not merely refer to or repeat the language in the organizational document. List each activity separately in the order of importance based on the relative time and other resources devoted to the activity. Indicate the percentage of time for each activity. Each description should include, as a minimum, the following: **(a)** a detailed description of the activity including its purpose and how each activity furthers your exempt purpose; **(b)** when the activity was or will be initiated; and **(c)** where and by whom the activity will be conducted.

This is a new association with no past activities.

The purpose of the Association is to promote the common business interests of and improve business conditions for school psychologists in the [redacted] region. Present and future activities will include:

Continuing Professional Education / Professional Development – 80%

Continuing professional education for school psychologists, school psychologist trainers and supervisors, and graduate students or other individuals pursuing a career in school psychology. Continuing professional education will be provided at in-person events, online trainings, and through publications. Professional development opportunities, such as resume creation and job fairs, will also be provided.

Communications – 20%


The association will also provide information regarding school psychology to the general public, individuals interested in school psychology as a career, school administrators, and other interested parties. The purpose of such communications will be to advance the common interests of school psychologists in the [redacted] region.

- 2** List the organization's present and future sources of financial support, beginning with the largest source first.

Membership Dues

Event Registration Fees

Part II. Activities and Operational Information *(continued)***3** Give the following information about the organization's governing body:

| a Names, addresses, and titles of officers, directors, trustees, etc. | b Annual compensation |
|--|-----------------------|
|  | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |
| | 0 |

4 If the organization is the outgrowth or continuation of any form of predecessor, state the name of each predecessor, the period during which it was in existence, and the reasons for its termination. Submit copies of all papers by which any transfer of assets was effected.

N/A

5 If the applicant organization is now, or plans to be, connected in any way with any other organization, describe the other organization and explain the relationship (for example, financial support on a continuing basis; shared facilities or employees; same officers, directors, or trustees).

The applicant organization is an affiliate of the California Association of School Psychologists (CASP). CASP may provide services to the application organization for a standard fee charged to all affiliated organizations. There are no shared employees, nor any ex officio shared board members; however, there may at times be shared board members as elected by the members of this organization and CASP.

6 If the organization has capital stock issued and outstanding, state: (1) class or classes of the stock; (2) number and par value of the shares; (3) consideration for which they were issued; and (4) if any dividends have been paid or whether your organization's creating instrument authorizes dividend payments on any class of capital stock.

N/A

7 State the qualifications necessary for membership in the organization; the classes of membership (with the number of members in each class); and the voting rights and privileges received. If any group or class of persons is required to join, describe the requirement and explain the relationship between those members and members who join voluntarily. Submit copies of any membership solicitation material. Attach sample copies of all types of membership certificates issued.

Student - A person enrolled in a graduate-level training program in school psychology. No voting rights. #

Associate - A person in an allied field and not practicing as a school psychologist. No voting rights. #

Regular - A credentialed school psychologist or Licensed Educational Psychologist. Right to vote in elections. #

Retired - A credentialed school psychologist or a Licensed Educational Psychologist who has retired. No voting rights. #

8 Explain how your organization's assets will be distributed on dissolution.

Assets will be distributed to the California Association of School Psychologists, the California School Psychology Foundation, another affiliate of the California Association of School Psychologists, or some combination thereof.

Part II. Activities and Operational Information *(continued)*

- 9** Has the organization made or does it plan to make any distribution of its property or surplus funds to shareholders or members? ☐ Yes ☒ No

If "Yes," state the full details, including: **(1)** amounts or value; **(2)** source of funds or property distributed or to be distributed; and **(3)** basis of, and authority for, distribution or planned distribution.

- 10** Does, or will, any part of your organization's receipts represent payments for services performed or to be performed? ☐ Yes ☒ No

If "Yes," state in detail the amount received and the character of the services performed or to be performed.

- 11** Has the organization made, or does it plan to make, any payments to members or shareholders for services performed or to be performed? ☐ Yes ☒ No

If "Yes," state in detail the amount paid, the character of the services, and to whom the payments have been, or will be, made.

- 12** Does the organization have any arrangement to provide insurance for members, their dependents, or others (including provisions for the payment of sick or death benefits, pensions, or annuities)? ☐ Yes ☒ No

If "Yes," describe and explain the arrangement's eligibility rules and attach a sample copy of each plan document and each type of policy issued.

- 13** Is the organization under the supervisory jurisdiction of any public regulatory body, such as a social welfare agency, etc.? ☐ Yes ☒ No

If "Yes," submit copies of all administrative opinions or court decisions regarding this supervision, as well as copies of applications or requests for the opinions or decisions.

- 14** Does the organization now lease or does it plan to lease any property? ☐ Yes ☒ No

If "Yes," explain in detail. Include the amount of rent, a description of the property, and any relationship between the applicant organization and the other party. Also, attach a copy of any rental or lease agreement. (If the organization is a party, as a lessor, to multiple leases of rental real property under similar lease agreements, please attach a single representative copy of the leases.)

- 15** Has the organization spent or does it plan to spend any money attempting to influence the selection, nomination, election, or appointment of any person to any federal, state, or local public office or to an office in a political organization? ☐ Yes ☒ No

If "Yes," explain in detail and list the amounts spent or to be spent in each case.

- 16** Does the organization publish pamphlets, brochures, newsletters, journals, or similar printed material? ☐ Yes ☒ No

If "Yes," attach a recent copy of each.

The form 1024 has several schedules; only schedule C needs to be completed.

Schedule C **Organizations described in section 501(c)(5) (Labor, agricultural, including fishermen's organizations, or horticultural organizations) or section 501(c)(6) (business leagues, chambers of commerce, etc.)**

- 1** Describe any services the organization performs for members or others. (If the description of the services is contained in Part II of the application, enter the page and item number here.)
Services are as described in item 1 on page 2.

- 2** Fishermen's organizations only.—What kinds of aquatic resources (not including mineral) are cultivated or harvested by those eligible for membership in the organization?

- 3** Labor organizations only.—Is the organization organized under the terms of a collective bargaining agreement? . . . ☐ **Yes** ☐ **No**

If "Yes," attach a copy of the latest agreement.

Part III. Financial Data (Must be completed by all applicants)

Complete the financial statements for the current year and for each of the 3 years immediately before it. If in existence less than 4 years, complete the statements for each year in existence. **If in existence less than 1 year, also provide proposed budgets for the 2 years following the current year.**

A. Statement of Revenue and Expenses

| | (a) Current Tax Year | | 3 Prior Tax Years or Proposed Budget for Next 2 Years | | (e) Total |
|---|----------------------|----|---|-----|-----------|
| | From | To | (b) | (c) | |
| Revenue | | | | | |
| 1 Gross dues and assessments of members | | | | | |
| 2 Gross contributions, gifts, etc. | | | | | |
| 3 Gross amounts derived from activities related to the organization's exempt purpose (attach schedule) (Include related cost of sales on line 9.) | | | | | |
| 4 Gross amounts from unrelated business activities (attach schedule) | | | | | |
| 5 Gain from sale of assets, excluding inventory items (attach schedule) | | | | | |
| 6 Investment income (see instructions) | | | | | |
| 7 Other revenue (attach schedule) | | | | | |
| 8 Total revenue (add lines 1 through 7) | | | | | |
| Expenses | | | | | |
| 9 Expenses attributable to activities related to the organization's exempt purposes | | | | | |
| 10 Expenses attributable to unrelated business activities | | | | | |
| 11 Contributions, gifts, grants, and similar amounts paid (attach schedule) | | | | | |
| 12 Disbursements to or for the benefit of members (attach schedule) | | | | | |
| 13 Compensation of officers, directors, and trustees (attach schedule) | | | | | |
| 14 Other salaries and wages | | | | | |
| 15 Interest | | | | | |
| 16 Occupancy | | | | | |
| 17 Depreciation and depletion | | | | | |
| 18 Other expenses (attach schedule) | | | | | |
| 19 Total expenses (add lines 9 through 18) | | | | | |
| 20 Excess of revenue over expenses (line 8 minus line 19) | | | | | |

Expected income from dues goes on line 1

Expected income from events goes on line 3

Line 9: Expected expenses for workshops and other activities

Line 18: Administrative / nonprogram expenses

B. Balance Sheet (at the end of the period shown)

| | | Current Tax Year as of |
|------------------------------------|--|------------------------|
| Assets | | |
| 1 | Cash | 1 |
| 2 | Accounts receivable, net | 2 |
| 3 | Inventories | 3 |
| 4 | Bonds and notes receivable (attach schedule) | 4 |
| 5 | Corporate stocks (attach schedule) | 5 |
| 6 | Mortgage loans (attach schedule) | 6 |
| 7 | Other investments (attach schedule) | 7 |
| 8 | Depreciable and depletable assets (attach schedule) | 8 |
| 9 | Land | 9 |
| 10 | Other assets (attach schedule) | 10 |
| 11 | Total assets | 11 |
| Liabilities | | |
| 12 | Accounts payable | 12 |
| 13 | Contributions, gifts, grants, etc., payable | 13 |
| 14 | Mortgages and notes payable (attach schedule) | 14 |
| 15 | Other liabilities (attach schedule) | 15 |
| 16 | Total liabilities | 16 |
| Fund Balances or Net Assets | | |
| 17 | Total fund balances or net assets | 17 |
| 18 | Total liabilities and fund balances or net assets (add line 16 and line 17) | 18 |

If you already have money in the bank, report on line 1

If you have any unpaid bills, report on line 12

If there has been any substantial change in any aspect of the organization's financial activities since the end of the period shown above, check the box and attach a detailed explanation ☐

| | | | |
|---|---|---|---|
| Form 8718 (Rev. March 2018) Department of the Treasury Internal Revenue Service | User Fee for Exempt Organization Determination Letter Request ▶ Attach this form to determination letter application. (Form 8718 is NOT a determination letter application.) ▶ Go to www.irs.gov/Form8718 for the latest information. | | OMB No. 1545-1798 |
| | | | For IRS Use Only Control number _____ Amount paid _____ User fee screener _____ |
| Name of organization _____ | | Employer Identification Number _____ | |
| Caution: Do not attach Form 8718 to an application for a pension plan determination letter. Use Form 8717 instead. | | | |
| 1 Type of request | | Fee | |
| a <input checked="" type="checkbox"/> Application for recognition of exemption under section 501 or under section 521 from organizations (other than pension, profit-sharing, and stock bonus plans described in section 401). Enter the applicable fee amount ▶ \$ | | 600 | |
| b <input type="checkbox"/> Group exemption letters ▶ \$ | | | |
| <hr/> | | | |
| <p>Section references are to the Internal Revenue Code, unless otherwise noted.</p> <p>Instructions</p> <p>The law requires payment of a user fee with each application for a determination letter. For more information, see Rev. Proc. 2018-5, 2018-1 I.R.B. 233, or latest annual update, available on IRS.gov.</p> <p>Check only one box on line 1 for the type of application you are submitting. Then, enter the appropriate user fee amount in the space provided.</p> <p>Caution: The application will not be processed without payment of the proper user fee.</p> <p>Attach to Form 8718 a check or money order payable to the "United States Treasury" for the full amount of the user fee. If you do not include the full amount, your application will be returned. Attach Form 8718 to your determination letter application.</p> <p>Generally, the user fee will be refunded only if the Internal Revenue Service declines to issue a determination.</p> | | <p>Where To File</p> <p>Send the determination letter application and Form 8718 to:</p> <p>Internal Revenue Service P.O. Box 12192 Covington, KY 41012-0192</p> <p>Who Should File</p> <p>Organizations applying for federal income tax exemption, other than filers of Form 1023, Application for Recognition of Exemption Under Section 501(c)(3), or Form 1023-EZ (filed only electronically), should file Form 8718.</p> <p>Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. If you want your organization to be recognized as tax-exempt by the IRS, you are required to give us this information. We need it to determine whether the organization meets the legal requirements for tax-exempt status.</p> <p>You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of Form 8718 are covered in section 6104.</p> <p>The time needed to complete and file this form will vary depending on individual circumstances. The estimated average time is 5 minutes. If you have suggestions for making this form simpler, we would be happy to hear from you. You can send us comments from IRS.gov/FormComments. Or you can send your comments to the Internal Revenue Service, Tax Forms and Publications, 1111 Constitution Ave. NW, IR-6526, Washington, DC 20224. Do not send the form to this address. Instead, see <i>Where To File</i>, above.</p> | |
| Cat. No. 64728Z | | Form 8718 (Rev. 3-2018) | |

APPENDIX H: FTB FORM 3500A

This number will be stamped on your filed Registration of Unincorporated Association at the top right.

Submission of Exemption Request

Exemption Based on Internal Revenue Code (IRC) Sections 501(c)(3), 501(c)(4), 501(c)(5), 501(c)(6), 501(c)(7), or 501(c)(19), Federal Determination Letter

CALIFORNIA FORM

3500A

Enclose a copy of the Federal Determination Letter.

Organization Information

California corporation number/California Secretary of State file number

FEIN

Name of organization as shown in the organization's creating document

Web address

Street address (suite, room, or PMB no.)

City

State

ZIP code

Telephone

Second telephone

Fax

Representative Information

Name of representative

Email address

Representative's mailing address (suite, room, or PMB no.)

City

State

ZIP code

Telephone

Second telephone

Fax

Part I — Entity Information. See instructions.

- 1 Has the Franchise Tax Board (FTB) previously revoked the entity's tax-exempt status? 1 ☐ Yes ☒ No
If "Yes," STOP. File form FTB 3500.
- 2 Is the entity a trust? 2 ☐ Yes ☒ No
- 3 When did the organization establish, incorporate, organize, or conduct business in California? 3 mm / dd / yyyy
- 4 Provide gross receipts for the current year and the three immediately preceding taxable years in existence. Gross receipts are defined as the total amounts the organization received from all sources during its annual account period without subtracting any costs or expenses. If the organization has been in existence for less than one year, provide the projected amount of gross receipts for the entire year. List the account period beginning to the account period ending. Example: mm/dd/yyyy

| Current Year or Projected Gross Receipts | Gross Receipts for the three immediately preceding taxable years: | | |
|--|---|-------|-------|
| From: | From: | From: | From: |
| To: | To: | To: | To: |
| | | | |

This can be copied from the IRS Form 1024, page 5, line 8

Part II — Group Exemption. See instructions.

- 5 Is the parent organization applying for a group exemption? 5 ☐ Yes ☒ No
If "Yes," attach the federal group determination letter and a list of all California subordinates. Include each subordinate's name, corporation number, federal employer identification number (FEIN), address, and affiliation date.
- 6 Is a subordinate unit applying for tax-exempt status using a parent's IRS group determination letter? 6 ☐ Yes ☒ No
If "Yes," see instructions

Mail form FTB 3500A and a copy of the federal determination letter to:

EXEMPT ORGANIZATIONS UNIT, MS F120, FRANCHISE TAX BOARD, PO BOX 1286, RANCHO CORDOVA CA 95741-1286.

Under penalties of perjury, I declare I have examined this submission for exemption based on the IRC Sections 501(c)(3), 501(c)(4), 501(c)(5), 501(c)(6), 501(c)(7), or 501(c)(19), federal determination letter, and to the best of my knowledge and belief, it is true, correct, and complete.

DATE

SIGNATURE OF OFFICER OR REPRESENTATIVE

TITLE

8091193

FTB 3500A 2019 Side 1

Part III — Purpose and Activity

1 Exemption based on IRC 501(c)(3) Federal Determination Letter

Check the organization's primary purpose and activity:

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> Charitable | <input type="checkbox"/> Hospital | <input type="checkbox"/> Health care center | <input type="checkbox"/> Educational |
| <input type="checkbox"/> Mosque | <input type="checkbox"/> Church | <input type="checkbox"/> Temple | <input type="checkbox"/> Synagogue |
| <input type="checkbox"/> Testing for public safety | <input type="checkbox"/> Qualified sports organization | <input type="checkbox"/> Prevent cruelty to animals | <input type="checkbox"/> Prevent cruelty to children |
| <input type="checkbox"/> Literary | <input type="checkbox"/> Scientific | <input type="checkbox"/> Religious | <input type="checkbox"/> School |

2 Exemption based on IRC Section 501(c)(4) Federal Determination Letter

Check the organization's primary purpose and activity:

- | | | | | |
|---|---|---|---|---|
| <input type="checkbox"/> Civic league | <input type="checkbox"/> Local association of employees | <input type="checkbox"/> Social welfare | <input type="checkbox"/> Service clubs | <input type="checkbox"/> Veterans' organization |
| <input type="checkbox"/> Legislative activities | <input type="checkbox"/> Festival organizations | <input type="checkbox"/> Municipal building corporation | <input type="checkbox"/> Police, sheriff, volunteer firemen association | <input type="checkbox"/> Quasi governmental |

3 Exemption based on IRC Section 501(c)(5) Federal Determination Letter

Check the organization's primary purpose and activity:

- | | | | | |
|--------------------------------------|---------------------------------------|---|--|---|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Horticulture | <input type="checkbox"/> Labor | <input type="checkbox"/> Agriculture or horticulture county fair | <input type="checkbox"/> Public employees union |
| <input type="checkbox"/> AFL-CIO | <input type="checkbox"/> Independent | <input type="checkbox"/> Transportation workers | <input type="checkbox"/> Teamsters | |

4 Exemption based on IRC Section 501(c)(6) Federal Determination Letter

Check the organization's primary purpose and activity:

- | | | | | |
|---|--|--|--|---|
| <input type="checkbox"/> Board of trade | <input type="checkbox"/> Business league | <input type="checkbox"/> Chamber of commerce | <input type="checkbox"/> Real estate board | <input checked="" type="checkbox"/> Professional association or society |
|---|--|--|--|---|

5 Exemption based on IRC 501(c)(7) Federal Determination Letter

Check the organization's primary purpose and activity:

- | | | | | |
|--|--|---|--|--|
| <input type="checkbox"/> Social and recreational | <input type="checkbox"/> Golf club | <input type="checkbox"/> Camps | <input type="checkbox"/> Fraternity or sorority | <input type="checkbox"/> Dog or horse club |
| <input type="checkbox"/> Car, motorcycle, trailer club | <input type="checkbox"/> Hunting or fishing club | <input type="checkbox"/> Common recreational area | <input type="checkbox"/> Flying or airplane club | |

6 Exemption based on IRC Section 501(c)(19) Federal Determination Letter

Check the organization's primary purpose and activity:

- ☐ Veterans' organization

APPENDIX I: SAMPLE TREASURER'S REPORT

TREASURER'S REPORT

The bylaws should provide that the treasurer report regularly to the association. This written report should indicate what period of the fiscal year the report covers, the date it was prepared, and by whom. The report should also include the all income and expenses for the period. The report **should not be adopted** but **filed** for annual financial review/audit in the treasurer's file. These reports should be referred to the auditor or auditing committee during the audit process.

SAMPLE TREASURER'S REPORT

Home Town PTA Treasurer's Report

| | | | |
|-----------------------------------|-------------------|-----------------|-----------------|
| BALNCE ON HAND: 1/31/20__ | \$2,750.01 | | |
| INCOME | MONTHLY | YTD | BUDGET |
| Local Membership Dues | 62.50 | 250.00* | 300.00 |
| Investment | 8.33 | 83.33 | 100.00 |
| Donations | 1,000.00 | 0.0 | 1,000.00 |
| Fundraising Projects | | | |
| Carnival | 0.00 | 1,700.00 | 2,000.00 |
| Book Sale | 456.14 | 0.00 | 600.00 |
| TOTAL INCOME | 1,526.97 | 2,033.33 | 4,000.00 |
| EXPENSES | | | |
| Administration | | | |
| Supplies | 25.00 | 155.00 | 200.00 |
| Past President's Pin | 25.00 | 25.00 | 50.00 |
| Printing | 0.00 | 100.00 | 150.00 |
| Mailing Permit/Postage | 15.00 | 700.00 | 750.00 |
| Liability Insurance | 0.00 | 185.00 | 200.00 |
| Bonding Insurance | 0.00 | 90.00 | 100.00 |
| Leadership Education | | | |
| Council Conferences | 10.00 | 30.00 | 50.00 |
| State PTA Convention | 0.00 | 245.00 | 300.00 |
| Publications | 40.00 | 110.00 | 200.00 |
| Committees | | | |
| Membership | 20.00 | 80.00 | 100.00 |
| Programs | 20.00 | 176.18 | 500.00 |
| Volunteer Recognition | | | |
| Awards | 0.00 | 0.00 | 50.00 |
| Special Appreciation Awards | 0.00 | 0.00 | 50.00 |
| Projects | | | |
| Carnival | 0.00 | 251.63 | 300.00 |
| Book Sale | 14.89 | 0.00 | 100.00 |
| Reflections | 0.00 | 185.00 | 200.00 |
| Parent Education | 0.00 | 156.00 | 200.00 |
| Student Enrichment Grants | 0.00 | 175.00 | 200.00 |
| Self-Esteem Program | 0.00 | 79.00 | 100.00 |
| Reading Scholarships | 0.00 | 185.00 | 200.00 |
| TOTAL EXPENSES | 169.89 | 2,927.81 | 4,000.00 |
| BALANCE ON HAND: 2/28/20__ | \$4107.09 | | |

* (200 membership @ \$5=\$1,000.00; 200 @ \$3.75 sent to state =\$750.00 so local total 200 @ \$1.25 =\$250.00)

Submitted by: _____, Treasurer

APPENDIX J: SAMPLE BUDGET

[View on Google Drive](#)

BAASP 2020-2021 Budget

Starting date
Today
Cash balance alert minimum

July 1, 2020
April 6, 2021

| | Beginning | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 | |
|---|-----------|------------|------------|------------|------------|------------|-------------|------------|-------------|-------------|-------------|-------------|-------------|------------|
| Cash on hand (beginning of month) | | | \$6,657.36 | \$6,772.84 | | | \$6,641.19 | \$8,025.04 | \$10,367.04 | | \$11,307.52 | \$10,152.69 | | |
| REVENUE | | | | | | | | | | | | | | |
| Membership Dues | | \$1,120.00 | | | | | \$ 120.00 | | | | | | | \$1,120.00 |
| FBAs in School Workshop | | | | | | | | | | | | | | \$ 120.00 |
| Evidence-based Evaluation of English Learners Workshop | | | | | | | | | \$4,600.00 | | | | | \$4,600.00 |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| Total Revenue | | \$1,120.00 | \$ - | \$ - | \$ - | \$ - | \$ 120.00 | \$ - | \$4,600.00 | \$ - | \$ - | \$ - | \$ - | \$5,840.00 |
| EXPENSES | | | | | | | | | | | | | | |
| BAASP Logo | | \$ 100.00 | | | | | | | | | | | | \$ 100.00 |
| Rent | | | | | | | | | | | | | | \$ - |
| Presenter Payments | | | | | | | \$ 800.00 | | | | | | | \$ 800.00 |
| CEU Payments | | | | | | | | | \$ 240.00 | | | | | \$ 240.00 |
| Tax exemption application | | | | | | | | | | | \$ 300.00 | | | \$ - |
| Mailing of tax exemption application | | | | | | | | | | | \$ 5.20 | | | \$ - |
| Wild Apricot membership | | | | | | | | | | | \$ 540.00 | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| | | | | | | | | | | | | | | \$ - |
| TOTAL Expenses | | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 800.00 | \$ - | \$ 240.00 | \$ - | \$ 845.20 | \$ - | \$ - | \$1,040.00 |
| Cash on hand (end of month) | | \$1,120.00 | \$ - | \$ - | \$ - | \$ - | \$ (680.00) | \$ - | \$4,360.00 | \$ - | \$ (845.20) | \$ - | \$ - | |
| Accumulated balance | | \$1,120.00 | \$1,120.00 | \$1,120.00 | \$1,120.00 | \$1,120.00 | \$ 440.00 | \$ 440.00 | \$4,800.00 | \$ 4,800.00 | \$ 3,954.80 | \$ 3,954.80 | \$ 3,954.80 | |

APPENDIX K: SAMPLE REGISTRATION FORM

[Google Drive Link](#)

Workshop

9/2/21, 3:43 PM

Workshop

Workshop with

* Required

1. Email *

2. Last Name *

3. First Name

4. District/University Affiliate

5. Position (check all that apply)

Check all that apply.

☐ School Psychologist

☐ ERMHS Assessor

☐ LEP

Other: ☐

<https://docs.google.com/forms/u/0/d/1oLLHIHOXHXU1zWIJZOFHlaM6JmcM--yOLFFCacA81G0/printform>

Page 1 of 3

6. Registering for CEUs? (Must bring license number to training) *

Mark only one oval.

☐ Yes

☐ No

7. If registering for CEUs please provide your license number below.

After submitting, please continue below to pay for the workshop through Paypal

If you have any question please feel free to contact us at Workshops@Baasp.org

This content is neither created nor endorsed by Google.

Google Forms

APPENDIX L: SAMPLE INVOICE

| | |
|--|-----------------|
| Ventura County Association of School Psychologists | |
| | Date: 8/16/2021 |
| DESCRIPTION | |
| <u>VCASP Training</u> | |
| Culturally-Affirming Social Emotional Learning Strategies | |
| Presenter: Dr. Byron M. McClure, D.Ed. | |
| Date of Training: 8/26/2021 | |
| | AMOUNT |
| REGISTRANTS: | |
| Jennifer Payne | \$40.00 |
| Irene Martinez | \$40.00 |
| Sabrina Monney | \$40.00 |
| of Ojai Unified School District | |
| | |
| | |
| Make check payable to VCASP and send to: | |
| VCASP | |
| c/o Michelle Valdivieso | |
| 587 Durango Ct | |
| Camarillo, CA 93010 | |
| | |
| Subtotal | \$120.00 |
| | |
| TOTAL | \$120.00 |
| Thank You For Your Support! | |

APPENDIX M: SAMPLE RECEIPT



VENTURA COUNTY ASSOCIATION OF SCHOOL PSYCHOLOGISTS

This verifies that _____ of
_____ has paid \$ _____ to attend a
professional development entitled "Attention & Executive Functioning" on
January 18, 2019.

Michelle Valdivieso, Treasurer



VENTURA COUNTY ASSOCIATION OF SCHOOL PSYCHOLOGISTS

This verifies that _____ of
_____ has paid \$ _____ to attend a
professional workshop entitled "Attention & Executive Functioning" on
January 18, 2019.

Michelle Valdivieso, Treasurer