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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 as well as 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 Policy 2100 of the Board Policy Manual, they may be granted charters as affiliates of CASP. For CASP Bylaws regarding Affiliates see Appendix A. CASP encourages its members to join the CASP Affiliate whose boundaries include the location of a member’s place of employment, 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.
GETTING STARTED

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

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

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

● The Affiliate must evidence a willingness to participate in the regularly scheduled activities of CASP which are held for Affiliates, their officers and members.

● The Affiliate shall in no way restrict its potential members from joining other CASP Affiliates or any other professional organizations.

● The geographic location (school districts) of the Affiliate shall not conflict, nor overlap with existing Affiliates without the expressed consent of the members of the existing Affiliates and the CASP Board. Geographic boundaries are determined by school district and/or county boundary lines and may include more than one district or county.

● At least fifty-one percent (51%) of the Affiliate's regular members shall be members of CASP and the Affiliate is required to maintain at least that percentage.

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](https://www.irs.gov) 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 individuals) but also to the individual receiving the funds (who could be liable for taxes on the funds). It is important that you 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.

**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. The IRS typically takes 4-6 months to process these applications, but you can operate your affiliate while the IRS is processing. 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.

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 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 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

#### MASS COMMUNICATIONS

#### PLANNING AND EXECUTING EVENTS

#### WEBSITES

#### 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 at https://casponline.org/casp-affiliates/ under the link titled “Affiliates and Their Contact Information.”

**AFFILIATE BOARD MEETINGS**

**RUNNING A BOARD MEETING**

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

**PARLIAMENTARY AUTHORITY**

2. The president should try to project an air of impartiality during the board meetings. The president writes the agenda, which is his or her main influence to the outcome of the meeting.
3. Back room politics should be avoided. This can be very disruptive to group dynamics.
4. Use parliamentary procedure to increase efficiency of meeting:
   a. The President is responsible for seeing that the business of the affiliate is transacted in proper order and expedited as much as possible; that members observe the rules of debate; that order and decorum are always observed; that the rules of the affiliate are enforced with as little friction as possible. (From “Parliamentary Law” by Robert.)
b. Call the meeting to order on time. If the first meeting of your term is called on time, the members will 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. 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.
      d. Questions start discussion.
      e. Questions lead discussion into purposes of meeting.
      f. Questions bring out different points of view.
      g. Questions bring out facts.
      h. Important issues can be resolved by converting them into questions, which will shed the light of truth.
   6. Everyone participates in group discussions. Present all ideas and viewpoints as positive contributions.
   7. Require ideas to be stated objectively and positively.
   8. Rule out criticism.
   9. Welcome bold ideas.
   10. Stick to the subject. Use light signals if necessary. Red means “you are criticizing, explaining or off the subject”, green means “go ahead.”
11. Evaluate results of discussions and the meeting for the record, future direction and follow-up.

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

D. Develop and retain good member participation
   1. Use reward or recognition of outstanding work done.
   2. Point out relationship to total effect.
   3. Stress 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 he/she approves of them or not; to try to further the objectives of the affiliate; to attend its
meetings with reasonable regularity; to pay respect to its officers in their official
capacity as its representatives; to abstain from acts or remarks outside of the
meetings that will in any way interfere with the work being done by the officers or
committees of the affiliate and by its authority; to pay attention to the speaker during
debate and to the business in debate; to attend faithfully to any duty assigned, or ask
to be excused. (From “Parliamentary Law” by Henry M. Robert.)

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<th>SAMPLE AGENDA FOR AFFILIATE MEETINGS</th>
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<td>A. Welcome and introductions: get members acquainted and at ease.</td>
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| 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. |

| PROMOTE YOUR AFFILIATE |

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<th>MEETINGS &amp; SPECIAL EVENTS</th>
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| 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.

### HOW TO FIND SPEAKERS/WORKSHOP PRESENTERS

A. CASP has several Corporate Members. These are test publishing companies, universities and other groups with business interests in school psychology. They also frequently can arrange for guest speakers/trainers at little or no cost to the Affiliate. CASP has contact information for all corporate members.

B. CASP Conventions and Spring Institutes are excellent places 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/](http://casponline.org/about-casp/speakers-bureau/) This is a listing of trainers who have presented at CASP-sponsored continuing education events. This list is updated after each convention and at speakers’ requests. It includes updated emails for each speaker.

D. Please keep in mind that some speakers charge for presentations. You will have to take this into consideration when determining whether and how much to charge potential attendees for the workshop. Also take into account transportation, lodging, food, audio-visual rental and room rental when determining what to charge.

E. Once the subject matter for a presentation has been decided upon, the request for the speaker is usually made by phone or email (see prior section). As with any professional presentation, ample time is needed for sufficient preparation. Allow the speaker approximately 30 days from the time of request to the date of the meeting.

F. If the desired speaker is a member of the CASP 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.

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.
HOW CASP AND AFFILIATES WORK TOGETHER

The Affiliate is a component of CASP. The Affiliate is chartered by CASP and at least half of its board of directors and 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 Affiliate groups 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:

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

REGION REPRESENTATIVES

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:

• Serve as a voting member of the Board.
• Are elected to office by regular members in good standing in their respective regions.
• Represent the Association in meetings with Affiliates, while serving as a liaison to Affiliates in the region. Communicate on a regular basis with Affiliate officers, and regularly attend Affiliate meetings.
• Facilitate and assist groups of members seeking to organize as an Affiliate. Identify new areas for the development of affiliates and provide assistance to local school psychologists to encourage this activity.
• Promote membership in CASP and Affiliates, and ensure members in the region who do not renew are personally contacted.
• Provide assistance and support Affiliate officers in pursuit of various projects and activities.
• Encourage committee appointments at the Affiliate level (e.g. legislative, membership, etc.)
• Communicate on a regular and ongoing basis with the Affiliate Representative to coordinate local activities and address areas of concern to the Affiliate.
• Assist in recruiting qualified candidates for the Board.
• Contribute articles to CASP Today and Affiliate newsletters.
• Support and assist in the granting of awards to the officers and members of Affiliates.
• Provide support for the CASP awards and nominations processes.
• Provide liaison to specific committees as directed by the President.
• Carry out such other responsibilities as may be assigned by the President or the Board.
CASP BOARD MEMBERS

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 one-year 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 Executive Board 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. 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.
- **Communications Coordinator:** Responsible for the production/coordination of the Association’s publications – quarterly newsletter and all online publications – as well as, the development of all promotion/marketing material related to Association activities, such as the annual convention and Spring Institute program brochures, etc. Also is the content manager for the CASP website and administrator of the Association’s social media presence – Facebook, Twitter, LinkedIn, etc. Supports the Executive Director and staff with special projects, as needed. The 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 events, and other general office duties. The Associate is available to help Affiliates with any and all questions regarding CEUs. Responsible for data entry related to member records, coordination of new, renewed, and prospective member-related material and mailings. Works with the Executive Director to produce statistical reports and information on the membership, dues, special events and other items.
- **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 the CASP Board policies. These policies are general guidelines for such issues as membership, affiliate formation, officers required, and manners in which CASP and local groups work together. Outside of these general guidelines, local affiliates maintain great latitude in determining their needs and activities.

**AFFILIATES AND THE ANNUAL CONVENTION**

Each year, CASP sponsors an annual convention for the profession. The location of the convention varies each year in 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 provide/s 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 through CASP. Detailed information on this program is found in Appendix K. This program is managed by the staff Education Associate.
APPENDIX A: CASP BYLAWS REGARDING AFFILIATES

Article 4. Affiliates

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

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

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

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

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

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

Section 4.7. Membership.

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

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

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

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

**Section 4.10. Transition Provision.** Any affiliate group that held a charter from the predecessor of the Association on the day the Association incorporated shall continue to hold a charter as an Affiliate after incorporation, without any further act by any party. The terms of such charter shall be deemed amended to conform with these Bylaws. Any Affiliate not willing to become an Affiliate of the Association may surrender its charter as provided above.
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. (CASP’s Policies and Procedures Manual, Policy 2110-2115 enclosed.)
I have reviewed the documentation submitted by ________________________,
spokesperson for the proposed Affiliate known as ___________________________
__________________________ and verify the group’s qualifications for charter as an official
Affiliate of the California Association of School Psychologists.

Signature of Region Representative: ________________________________

Presented to the Board on: ________________________________

Affiliated Charter Granted on: ________________________________
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:
  o A Regular Member shall be a credentialed school psychologist or Licensed Educational Psychologist.
  o An Associate member shall be a person in an allied field and not practicing as a school psychologist.
  o A Student Member shall be a person enrolled in a graduate-level training program in school psychology.
  o A Retired Member shall be a credentialed school psychologist 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 by their terms, 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: 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 XIII: 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

REGISTRATION OF UNINCORPORATED NONPROFIT ASSOCIATION
PURSUANT TO CALIFORNIA CORPORATIONS CODE SECTION 21309

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.

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.

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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 rossette:

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, and 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 L.PULNA 12B (Rev 08/2005)
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/T/R: ___________________________

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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/fe/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 94225, 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 filled 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/fe/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 $0.50 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 an 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 on 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.
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)

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Phone (optional)__________________________

**Entity Information:** (Please type or print legibly)

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

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: ___________________________________________________________________

<table>
<thead>
<tr>
<th>Secretary of State Use Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>T/TR:</td>
</tr>
<tr>
<td>AMT REC’D: $</td>
</tr>
</tbody>
</table>
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

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

Legal name of entity (or individual) for whom the EIN is being requested

Trade name of business (if different from name on line 1)

Executor, administrator, trustee, “care of” name

Mailing address (room, apt., suite no., and street, or P.O. box)

Street address (if different) (Don’t enter a P.O. box.)

City, state, and ZIP code if foreign, see instructions

City, state, and ZIP code if foreign, see instructions

County and state where principal business is located

Name of responsible party

Is this application for a limited liability company (LLC) (or a foreign equivalent)?

Yes
No

If “Yes,” was the LLC organized in the United States?

Yes
No

Type of entity (check only one box).

Government agencies

Indian tribal governments/enterprises

Foreign country

Federal government

State/local government

Church or church-controlled organization

Farmers’ cooperative

REMIC

Federaal government

Indian tribal governments/enterprises

If a corporation, name the state or foreign country (if applicable) where incorporated

If "Yes," write previous EIN here

Has the applicant entity shown on line 1 ever applied for and received an EIN?

Yes
No

If "Yes," see the instructions for the correct box to check.

Group Exemption Number (GEN) if any

Reason for applying (check only one box)

State

Unincorporated Association

Unincorporated Association

Sole proprietor (SSN)

Plan administrator (TIN)

Military/National Guard

State/local government

Unincorporated Association

Unincorporated Association

Partnership

Trum (TIN of grantor)

State/local government

Unincorporated Association

Unincorporated Association

Corporation (enter form number to be filed)

Corporation (enter form number to be filed)

Military/National Guard

Unincorporated Association

Unincorporated Association

Other nonprofit organization (specify)

Other nonprofit organization (specify)

Unincorporated Association

Unincorporated Association

Other (specify)

Unincorporated Association

Unincorporated Association

Type or print clearly

State.

Secretary of

filed by the

Association was

Unincorporated

your Registration

is is the date

Closing month of accounting year

June

If you expect your employment tax liability to 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.

If you expect your employment tax liability to be $1,000 or

less in a full calendar year

and

you will file Form 944 annually instead of Forms 941 quarterly, check here.

Note:

Your employment tax liability generally will be $1,000

or less if you expect to pay $5,000 or less in total wages.

Use business started or acquired (month, day, year). See instructions.

Highest number of employees expected in the next 12 months (enter -0- if none).

No employees expected, skip line 14.

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)

Check one box that best describes the principal activity of your business.

Health care & social assistance

Wholesale agent/broker

Construction

Rental & leasing

Transportation & warehousing

Accommodation & food service

Wholesale-other

Retail

Real estate

Manufacturing

Finance & insurance

Other (specify)

Professional association

Continuing education

Have the applicant entity shown on line 1 ever applied for and received an EIN?

Yes
No

If "Yes," write previous EIN here

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.

Designee’s name

Designee’s telephone number (include area code)

Address and ZIP code

Designee’s fax number (include area code)

Applicant’s telephone number (Include area code)

Applicant’s fax number (Include area code)

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

Cat. No. 16655N
Form SS-4
(Rev. 12-2019)

Affiliate Leadership Manual
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APPENDIX G: IRS FORM 1024

Application for Recognition of Exemption
Under Section 501(a)

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.

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

- [ ] Section 501(c)(3)—Public charities (Schedule A)
- [ ] Section 501(c)(4)—Business leagues, chambers of commerce, etc. (Schedule A)
- [ ] Section 501(c)(6)—Labor, agricultural, or horticultural organizations (Schedule A)
- [ ] Section 501(c)(8)—Social clubs (Schedule A)
- [ ] Section 501(c)(9)—Fraternal beneficiary societies, etc. providing life, sick, accident, or other benefits to members (Schedule A)
- [ ] Section 501(c)(10)—Benefit, life insurance associations, mutual thrift or savings banks, or other associations, or organizations, or trusts of like character (Schedule A)
- [ ] Section 501(c)(11)—Cemeteries, crematoria, and like corporations (Schedule A)
- [ ] Section 501(c)(13)—Mutual insurance companies or corporations, other than life or marine (Schedule A)
- [ ] Section 501(c)(14)—Trusts providing for the payment of supplemental unemployment benefit tax (Schedule A)
- [ ] Section 501(c)(15)—Aesthetically pleasing, cooperative, voluntary, or like organizations (Schedule A)
- [ ] Section 501(c)(22)—Title holding corporations or trusts (Schedule A)

1. Full name of organization (as shown in organizing document)

2. Employer identification number (EIN)

3. Name and telephone number of person to be contacted if additional information is needed

Address and street

City, town, or post office, state, and ZIP code

City of incorporation or organization

State of incorporation or organization

Form 1024-A (Rev: 2013-18)

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

For Paperwork Reduction Act Notice, see Instructions.

Catalog No. 13341K

Form 1024 (Rev. 1-2018)

Affiliate Leadership Manual

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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 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 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 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:

<table>
<thead>
<tr>
<th>a Names, addresses, and titles of officers, directors, trustees, etc.</th>
<th>b Annual compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 applicant 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 by-laws authorize 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 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 own or does it plan to own 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 owner. Also, attach a copy of any rental or lease agreement. (If the organization is a party, as a lessee, 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.
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 minerals) 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.
**A. Statement of Revenue and Expenses**

<table>
<thead>
<tr>
<th>Revenue</th>
<th>2023 Current Tax Year</th>
<th>2022 Prior Tax Year</th>
<th>2021 Proposed Budget for Next 2 Years</th>
<th>(e) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gross dues and assessments of members</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Gross contributions, gifts, etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Gross amounts derived from activities related to the organization’s exempt purpose (attach schedule)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Include related cost of sales on line 9)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Gross amounts from unrelated business activities (attach schedule)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Gain from sale of assets, excluding inventory items (attach schedule)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Investment income (see instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Other revenue (attach schedule)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Total revenue (add lines 1 through 7)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Expenses**

| 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 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 18)                |                       |                     |                                       |           |

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

<table>
<thead>
<tr>
<th>Assets</th>
<th>2023 Current Tax Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Cash</td>
<td></td>
</tr>
<tr>
<td>2 Accounts receivable, net</td>
<td></td>
</tr>
<tr>
<td>3 Inventories</td>
<td></td>
</tr>
<tr>
<td>4 Bonds and notes receivable (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>5 Corporate stocks (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>6 Mortgage loans (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>7 Other investments (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>8 Depreciable and depletiable assets (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>9 Land</td>
<td></td>
</tr>
<tr>
<td>10 Other assets (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>11 Total assets</td>
<td></td>
</tr>
<tr>
<td>Liabilities</td>
<td></td>
</tr>
<tr>
<td>12 Accounts payable</td>
<td></td>
</tr>
<tr>
<td>13 Contributions, gifts, grants, etc., payable</td>
<td></td>
</tr>
<tr>
<td>14 Mortgages and notes payable (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>15 Other liabilities (attach schedule)</td>
<td></td>
</tr>
<tr>
<td>16 Total liabilities</td>
<td></td>
</tr>
</tbody>
</table>

**Fund Balances or Net Assets**

<table>
<thead>
<tr>
<th>Fund Balances or Net Assets</th>
<th>2023 Current Tax Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 Total fund balances or net assets</td>
<td></td>
</tr>
<tr>
<td>18 Total liabilities and fund balances or net assets (add line 16 and line 17)</td>
<td></td>
</tr>
</tbody>
</table>

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.
APPENDIX H: FTB FORM 3500A

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

Enclose a copy of the Federal Determination Letter.

Organization Information

California corporation number/California Secretary of State file number

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? .......................... Yes  No

   If "Yes," STOP. File form FTB 3500.

2. Is the entity a trust? ............................................................... Yes  No

3. When did the organization establish, incorporate, organize, or conduct business in California? ........ 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

   From: From: From: From: From:
   To: To: To: To:

   Gross Receipts for the three immediately preceding taxable years:

   From: From: From: From:
   To: To: To: To:

Part II — Group Exemption. See instructions.

5. Is the parent organization applying for a group exemption? .......................... 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? .......................... 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 Section 501(c)(3) Federal Determination Letter**
   Check the organization’s primary purpose and activity:
   - [ ] Charitable
   - [ ] Hospital
   - [ ] Mosque
   - [ ] Church
   - [ ] Testing for public safety
   - [ ] Qualified sports organization
   - [ ] Literary
   - [ ] Scientific
   - [ ] Health care center
   - [ ] Temple
   - [ ] Synagogue
   - [ ] Prevent cruelty to animals
   - [ ] Prevent cruelty to children
   - [ ] Religious
   - [ ] School

2. **Exemption based on IRC Section 501(c)(4) Federal Determination Letter**
   Check the organization’s primary purpose and activity:
   - [ ] Civic league
   - [ ] Local association of employees
   - [ ] Legislative activities
   - [ ] Festival organizations
   - [ ] Social welfare
   - [ ] Municipal building corporation
   - [ ] Police, sheriff, volunteer firemen association
   - [ ] Service clubs
   - [ ] Veterans’ organization
   - [ ] Quasi governmental

3. **Exemption based on IRC Section 501(c)(5) Federal Determination Letter**
   Check the organization’s primary purpose and activity:
   - [ ] Agriculture
   - [ ] Horticulture
   - [ ] Labor
   - [ ] Agriculture or horticulture county fair
   - [ ] AFL-CIO
   - [ ] Independent
   - [ ] Transportation workers
   - [ ] Teamsters
   - [ ] Public employees union

4. **Exemption based on IRC Section 501(c)(6) Federal Determination Letter**
   Check the organization’s primary purpose and activity:
   - [ ] Board of trade
   - [ ] Business league
   - [ ] Chamber of commerce
   - [ ] Real estate board
   - [ ] Professional association or society

5. **Exemption based on IRC Section 501(c)(7) Federal Determination Letter**
   Check the organization’s primary purpose and activity:
   - [ ] Social and recreational
   - [ ] Golf club
   - [ ] Camps
   - [ ] Fraternity or sorority
   - [ ] Dog or horse club
   - [ ] Car, motorcycle, trailer club
   - [ ] Hunting or fishing club
   - [ ] Common recreational area
   - [ ] 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
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

BALANCE ON HAND: 1/31/20__ $2,750.01

INCOME
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__ $4,107.09

* (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
## Starting a Nonprofit

### SAMPLE Organizational Operating Budget

<table>
<thead>
<tr>
<th></th>
<th>20XX</th>
<th>20XX</th>
<th>20XX</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUPPORT &amp; REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions (Individual and Corporate)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation Grants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
</tr>
<tr>
<td><strong>EXPENSES</strong></td>
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<td>Wages &amp; Related Costs</td>
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<td>Programs [insert specific]</td>
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<td>Facilities</td>
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<td>General Administration</td>
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<td>Other</td>
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<td>Fundraising</td>
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<td><strong>TOTAL EXPENSES</strong></td>
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<td><strong>Net Surplus/(Deficit)</strong></td>
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APPENDIX K: CONTINUING EDUCATION UNIT PROCEDURES

BACKGROUND

The California Association of School Psychologists (CASP) is licensed to offer continuing education units (CEU) to Licensed California Social Workers (LCSW), Licensed Marriage and Family Therapists (LMFT), Licensed Professional Clinical Counselors (LPCC), and Licensed Educational Psychologists (LEP). CASP is also a provider of Continuing Professional Development for Nationally Certified School Psychologists (NCSP). Offering CEUs to licensed and/or certificated professionals provides an important service, allowing them to maintain the individual's license and certification. In addition, offering CEUs may increase attendance at affiliates' workshops.

LCSWs, LMFTs, LPCCs, and LEPs are licensed through the Board of Behavioral Sciences which requires 36 hours of CEUs for each two-year license renewal period. LCSWs, LMFTs, LPCCs, and LEPs are expected to document and maintain records of their CEU activities. NCSPs must obtain 10 of the 75 CPDs required for renewal from NASP- or APA-approved providers during each three-year renewal period.

CASP is offering the CEUs for all Board of Behavioral Sciences licensees (LEPs, LPCCs, LMFTs and LCSWs) both through its recognition as a provider of units for NCSPs and because the association was written into the legislation that ended the BBS’ ability to approve its providers.

PROCEDURES FOR OFFERING CEUS FOR IN-PERSON EVENTS

CASP affiliates can offer CEUs via the CASP licensing when the affiliate follows the procedures below:

1. **At least two weeks prior to the workshop**, please email to CASP a flyer with the following information; **Title and description of training, name and bio of presenter, date, time and location of training, and number of hours offered**. This will allow us to determine whether the workshop qualifies for CEUs. Be aware that requests received less than two weeks prior to the workshop risk not being approved and cannot be advertised as providing CEUs until they are approved.

2. **When your workshop is approved, you will need to add the following statement on the workshop promotional materials.** This statement must not be added to promotional materials unless and until the workshop is approved by CASP.

   *This course meets the qualifications for (number of hours) hours of continuing education credit for LEPs, LMFTs, LPCCs and LCSWs as required by the California Board of Behavioral Sciences. This course also qualifies for (number of hours) of continuing professional development for Nationally Certified School Psychologists, under provider number 1025. CASP maintains responsibility for the program and its content.*

   Each individual requesting CEUs/CPD must pay $20 to the affiliate for the processing of their CEUs for each workshop. Affiliates should include that information in promotional materials.

3. After approval of your event, a packet of information for offering the credits will be sent from CASP to the affiliate. This packet will include detailed instructions, an attendance sheet, evaluation forms and receipt forms to be used to record payment. The affiliate should double check the forms to ensure that the attendee
completed them. **Credit cannot be given if the form does not have the attendee’s BBS license number, if applicable, or the email address where the certificate should be sent.**

4. At the workshop, each person wishing to receive the credits **MUST SIGN IN AND OUT OF THE WORKSHOP**, complete the evaluation form and turn it in with payment. The affiliate then sends one check payable to CASP to cover all of the CEU applicants, plus the forms, to CASP, where the information is processed. If you prefer, you can email the forms to kathyL@casponline.org, and make payment electronically via PayPal: memberservices@casponline.org. CASP then sends certificates to the program participants. **Please be sure that forms and payment are returned to CASP within a timely manner.** Often, attendees are waiting on certificates in order to renew licenses.

**ADDITIONAL PROCEDURES FOR OFFERING CEUS FOR VIRTUAL EVENTS**

1. **If you’d like to use CASP’s Zoom account for your webinar, you must contact CASP at least two weeks prior to your event.** Please note that we can only support one webinar at a time, so it will be first come, first served.

2. **Instead of sign-in sheets, each attendee requesting CEUs/CPD must complete a brief quiz.** The easiest method is to ask your presenter for 10 basic questions (multiple choice or True/False work best). Those questions can then be put into a Google Quiz. Each attendee must also complete an evaluation of the session; a Google form is the best method for this.

   Please contact Kathy at kathyL@casponline.org if you have any questions about this process.

3. **Each person wishing to receive the credits MUST pass the quiz with at least a 70%, complete the evaluation, and pay the fee.** You will then send the quiz results, evaluations, email addresses, and payment as described above. Again, CASP will email certificates directly to attendees.

**GENERAL INFORMATION**

**Advertising:** Depending on the timing, CASP may also offer advertising for affiliates’ workshops in CASP Today, and on the CASP website. Each affiliate’s CASP Region Representative also has the ability to email every CASP member in his or her region about the workshop. All advertising requests should be sent to corirm@casponline.org.

**Questions:** For questions regarding CEUs/CPD, please email kathyL@casponline.org