

*Inspiring Careers \* Empowering Lives*

**STATE DIVISION HANDBOOK**

National Career Development Association

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NCDA is a Division of the American Counseling Association

This Handbook revision completed by Wendy LaBenne of Saint Louis University as her Action Learning Project during her NCDA Leadership Academy Class of 2012-2013. NCDA wishes to commend Wendy, her board mentor: Rebecca Dedmond, and the Missouri CDA for their contributions in enhancing this State Leadership Handbook.

**TABLE OF CONTENTS**

INTRODUCTION 4

NCDA INFORMATION 5

Purpose of the Board of Directors

State Division Trustee

How NCDA can assist State Associations

How State Leaders can assist NCDA

State CDA eligibility for NCDA Benefits

STATE LEADERSHIP ADMINISTRATION 7

Articles of Incorporation and Bylaws

Division/Affiliates

Tax Exemption

Organization and Operation of NCDA State Divisions

Budget

Mission Statement

Executive Board

Directors and Officers Insurance

Committees

Parliamentary Procedures

Strategic Directions

Annual Report – State Leadership Report

List of NCDA State Divisions

COMMUNICATION 12

Membership

Membership Promotional Ideas

State Membership Recruitment Kit

NCDA Membership

Website

Social Media

State Newsletter

Government Relations

PROFESSIONAL DEVELOPMENT 16

Professional Development Ideas

Awards

NCDA Leadership Academy

Career Development Month

APPENDICES 19

A: Petition of Interest

B: Application of Chartering Intent and Sheet for Signatures

C: State Chartering Grant

D. State Leadership Annual Report

E. Budget Template

F. Sample Executive Board Position Descriptions

G. Sample Committee Chair Descriptions

H. Checklist for Starting New State Chapter

I. Sample New and Renewing Members Process

J. State Division Continuing Education Information

K. State Division Webinar Collaboration Information

INTRODUCTION

The purpose of the State Division Leaders' Handbook is to help State Division Leaders with the business of building, managing, and sustaining their state organization. The handbook describes State Division procedures, required reports, NCDA grant opportunities, and potential activities. Its intent is to be a handy reference for state leaders as they meet the challenges of guiding their state organization.

State Divisions are critical to the success of the National Career Development Association in several ways. State Divisions deliver significant services to the membership, they help identify the leadership of the future, and they provide essential feedback to NCDA.

**NCDA MISSION STATEMENT**

*The National Career Development Association provides professional development, publications, standards, and advocacy to practitioners and educators who inspire and empower individuals to achieve their career and life goals.*

Inspiring Careers – Empowering Lives!

NCDA INFORMATION:

Purpose of Board of Directors

The NCDA Board of Directors consists of the president, the president-elect, the president-elect-elect, the past president, secretary, treasurer, ACA Governing Council Representative, and six trustees (one Trustee dedicated to State Divisions, one Trustee-at-Large and four representing constituency groups of the association). The NCDA executive director is an ex-officio, non-voting member of the Board. The Board meets face-to-face three times per year, including at the annual conference and at two regional institutes normally hosted in the fall and spring. Additional meetings are held via conference call throughout the year. All meetings of the Board of Directors, except executive sessions, are open to any NCDA member.

Trustee for State Divisions

The Trustee for State Division is a resource and liaison between NCDA and the state CDA. His/her role is to share information among states, provide advice and resources from a national level, and refer requests to NCDA Headquarters as applicable. The Trustee for State Divisions is an advocate for all state divisions. In addition, he/she plans the State Leadership Training for the annual conference.

Formerly, NCDA assigned four regional trustees to represent the various CDAs. We hope that by consolidating this work into just one trustee, more information will be shared consistently; all state divisions will be more aware of each other and share best practices. The list below shows examples of the questions states had for the trustees in the past:

* Contributing to your state newsletter “News from NCDA” type of section
* Presenting at a state conference on NCDA resources
* Consultation to find keynote speakers for conferences
* Consultation on state conferences
* Information requests
* Clarification of NCDA organizational structure and policies
* Requests for NCDA members in a particular state within the region
* Phone conferences with state CDA Presidents
* Requests for information about workshops or conferences be shared with other states

How NCDA Can Assist State Associations

* Promote state professional development opportunities nationally
* Provide continuing education contact hours for state division events (see Appendix J)
* Help with identifying speakers for events
* Identification of NCDA members within the state
* Provide webinar recordings for use by state divisions

How State Leaders Can Assist NCDA

* Participate in NCDA’s Poster and Poetry contest
* Promote NCDA membership
* Advocate for career development to state representatives
* Nominate members for NCDA awards

**State CDA Eligibility Requirements for NCDA Benefits**

* The state CDA President is required to be a NCDA member. This membership can be paid by the state CDA or by the individual. The intent of this membership requirement is to ensure the state CDA President is knowledgeable about NCDA to better inform the state membership.
* State CDA Presidents or designated state CDA officer should complete all information inquires such as surveys, end of year state leadership report, etc. by the requested deadline.
* Ideally, all state division members should become members of NCDA.
* Chartered state divisions may use the NCDA logo on their websites, and use it as a basis for their own state division logo. The fonts currently used are:
  + NCDA – Broadband ICG
  + National Career Development Association – Myriad Pro

 

Being a state CDA chapter comes with responsibilities and benefits and your communication and cooperation is important to maintaining the quality of state CDAs. We hope each state CDA will maintain eligibility for the NCDA benefits listed below by complying with the two eligibility requirement listed above.

* Yearly state CDA grants
* Reduced NCDA conference registration fee for state CDA President
* State CDA awards
* Previously recorded NCDA webinars for state CDA use
* State leadership training at the conference
* Listing on the NCDA website; link to your state division website
* Marketing lists of NCDA members in your state/region
* Assistance with marketing your events through NCDA communications (website posts, marketing e-bulletins, etc.)
* Speakers Bureau
* Webinar Recordings (see Appendix K)
* Advocacy via the NCDA Government Relations Consultant
* State Bylaws consultation
* Leadership Academy opportunities

NEW STATE LEADERSHIP ADMINISTRATION:

Division/Affiliates

State CDAs can decide whether to develop independently or as a part of the state Counseling Association (state division of the American Counseling Association), if available. There are pros and cons to either choice. The state CDA is encouraged to investigate both options and determine the best format.

Articles of Incorporation and By-laws

Articles of Incorporation

Each state Career Development Association must be established as an independent legal entity, separate from its individual members. It is the state that grants this legal status and in return the organization follows the rules for the corporation established by the state. Please check with your state for how to incorporate.

Tax Exemption

Tax exempt status is not automatically granted once you have incorporated as a non-profit, nor does having a federal tax ID mean you are tax exempt status. Tax exempt status can only be granted by the Internal Revenue Service (IRS) once the appropriate paperwork has been submitted. The primary benefit of being granted tax exempt status is not being required to pay federal income tax.

There are two main types of tax exempt status that nonprofits typically incorporate under. One is a 501(c)(3) and the other is 501(c)(6). The primary difference between the two is that the 501(c)(3) is organized for education, research and charitable purposes. A 501(c)(6) is called a “business league” and the primary purpose is to promote a common business interest. Before determining the correct option, state leaders are encouraged to consult with an accounting professional in their state. Each state CDA is responsible for applying for their tax exempt status. Those states that choose to affiliate directly with their state Counseling Association may be able to share tax exempt status with that association, but it is up to each state to explore all rules and exceptions related to that arrangement.

Organization and Operation of NCDA State Divisions

**I. Enabling Legislation**

Article IV of the Bylaws of the National Career Development Association describes requirements for the establishment and operation of State Divisions. These guidelines have been developed in order to help states establish and operate State Divisions of NCDA in a manner compatible with the Bylaws.

**II. Forming a State Division**

1. Organizing Committee

The first step in the formation of a State Division is the selection of an Organizing Committee. The Committee should be geographically representative of the state and consist of at least 5 no more than 15 voting members of NCDA (professional, regular, emeritus, life, retired or student.)

1. Petition of Intent (Appendix A)

As soon as possible after its formation, the Organization Committee should submit a *Petition of Intent* to form a State Division and mail it to NCDA headquarters. All members of the Organizing Committee must sign the *Petition of Intent*

1. Bylaws
2. A set of bylaws should be prepared. A suggested model is available through NCDA Headquarters (to receive a copy, e-mail [dpenn@ncda.org](mailto:dpenn@ncda.org)). The bylaws should reflect the needs of each state. The bylaws should include the following:
3. Statement of Purpose and Objectives
4. Membership
5. Finances
6. Nominations and Elections
7. Officers and Their Duties
8. Committees
9. Selection of representatives to the Executive Council of the Branch
10. Statement of consistency with NCDA Constitution and Bylaws
11. A copy of the bylaws should be forwarded to NCDA headquarters of NCDA and to the Chair of the NCDA bylaws Committee.
12. Please check with the requirements of your state to ensure your by-laws and articles of incorporation are in compliance**.**
13. Application for a State Division Charter – (Appendix B)
14. After receiving the results of the review of the bylaws, the Application for a Charter as a State Division of NCDA should be forwarded to NCDA headquarters.
15. The Application must be accompanied by:
16. The approving signatures of at least 20 voting members of NCDA in the state. In special situations, the NCDA Board may accept fewer than 20 members. Contact your NCDA headquarters for more information.
17. A list of members of the State Division.
18. The bylaws of the State Division.

**III. Criteria for Consideration**

1. All officers, including members of the Executive Council of the State Division, must be voting members of NCDA.
2. Membership in the State Division must be available to all individuals in the state who meet the qualifications for voting membership in NCDA.
3. The bylaws of the State Division may permit individuals who are not voting members of NCDA to join the State Division. These persons may not hold office in the State Division, be a voting member at the NCDA Annual Meeting, or represent the State Division on the Executive Body of the State Branch of ACA.

**IV. Action on the Application**

1. The NCDA Board of Directors will review the application for a State Division Charter.
2. If conditionally approved by the Board of Directors, the application will be presented to the NCDA Annual Meeting held at the conference. A majority favorable vote of those members present is required for approval.
3. The Charter will be presented during the NCDA Annual Conference.

**V. Responsibilities of State Divisions Subsequent to Approval**

1. Proposed amendments to State Division Bylaws must be approved by the NCDA Bylaws Committee before adoption.
2. State Chartering Grant (Appendix C)
3. Before September 1 of each year (or upon the election of new officers), the State Division Leadership Report (Appendix D) must to submitted to NCDA headquarters.
4. A State Division shall collect its own fees and have complete management and control of the funds it expends.
5. A State Division must maintain at least 20 members who are also members of NCDA. The NCDA headquarters will notify State Divisions whose membership falls below this amount in writing that the membership deficiency must be remedied within one year. If the State Division fails to meet the membership requirement within this period, the Board of Directors shall recommend revocation of its charter at the Annual Meeting.

**Budget**

Developing a budget helps the organization plan for the future, control spending and examine revenues. Budgets may be developed on a one or two year cycle. The budget is created to assist the organization in meeting its objectives and is usually developed by the Executive Board with the Treasurer maintaining the daily function of the organization’s finances. Any changes made during the budget cycle should be updated accordingly. An audit of the organization’s finances may be required at tax time.

For a sample budget template, please see Appendix E.

Mission Statement

The purpose of the mission statement is to guide the actions of the organization and offer a compelling reason for its existence. Additionally, it assists in clarifying long term goals and ensures the organization’s leadership is all on the same page. As NCDA is the national organization, many state CDAs incorporate values and vision consistent with NCDA’s values and vision into the state CDA mission statement. Samples of other state CDA mission statements can be located on the individual [state CDA websites](http://ncda.org/aws/NCDA/pt/sp/about_divisions).

Executive Board

The Executive Board leads the organization and determines direction and policies. An effective board identifies how to measure success, establishes policy, determines the organization’s vision for the future, and monitors financial obligations and advocate for the organization’s members and purpose.

For a list of sample Executive Board position descriptions, please see Appendix F.

Directors and Officers Insurance

Your state CDA may want to consider this type of insurance to protect your board members should an individual or entity decide to bring a lawsuit against the organization. State CDAs should contact their state Counseling Association or ACA to learn more about obtaining this type of coverage.

Committees

Forming committees is a great way to get the work done while providing strong opportunities for the members of your organization to further develop their leadership. Development of committees is up to the Executive Board and should be in alignment with the mission of the organization. There could be regular committees such as Membership, Communication and Professional Development as well as ad hoc committees needed on an infrequent basis such as a an Assessment committee.

For sample committee chair descriptions, please see Appendix G.

Parliamentary Procedures

To facilitate meetings that are encouraging of debate and deliberation as well as being inclusive of all members, it is recommended that the Executive Board follow the procedures outlined in *Roberts Rules of Order*.

Strategic Directions

Developing a method of strategic planning for your state CDA provides a means of ensuring the continuity and forward movement of the organization. As Executive Board members move off the board, a strategic plan can help focus initiatives from one board to the next. Ideally, this enables the organization to move forward versus doing singular initiatives that don’t combine into a big picture for the organization.

State Leadership Report

Each year, NCDA publishes a National Leadership Directory that provides contact information for the State Division Leadership. It is a rich resource for state leaders who might want to network with their colleagues in neighboring states or throughout the country. This information, along with a link to state websites, is also available at the NCDA website at [www.ncda.org](http://www.ncda.org). Upon request, NCDA headquarters staff can provide you with contact information for NCDA members living or working in your area. For a copy of the Annual Report, please see Appendix D.

List of NCDA State Chapters

NCDA maintains a [state division section](http://ncda.org/aws/NCDA/pt/sp/about_divannouncements) on its website that has information about how to communicate with the state leadership. In addition, a link is listed beside each state that has a website. If your state has a website that is not linked on the NCDA website, please contact NCDA toll-free (866) 367-6232 or email [webeditor@ncda.org](mailto:webeditor@ncda.org) to request that a link be added. Scanning the NCDA and state division websites is a good way to see what others are doing and to get information for state newsletters.

Sections of the NCDA Website are designed to assist State Divisions with a variety of services:

* State Division Best Practices (ideas for programming and governance)
* NCDA Speakers Bureau (for those seeking a speaker for conference or workshops)
* Resource websites for use in career planning and other links to collaborative organizations
* Career development articles for use in State newsletters. NCDA publishes a monthly web magazine called [Career Convergence](http://ncda.org/aws/NCDA/pt/sp/career_convergence). States are urged to use this web magazine to promote NCDA to its members. Reprints for articles are subject to a reprint policy, which can be found online. For publication in a state newsletter, the reprint request process has been waived.
* Related Career Conferences includes lists of state conferences, organized by date. Submit your state conference information (title, date, location, and web link) to [webeditor@ncda.org](mailto:webeditor@ncda.org)

Checklist for starting new state chapter Appendix H.

COMMUNICATION:

Membership

When considering membership it is important to consider both recruitment and retention of members.

Recruitment

Where can you find new members? Who should be your target audience? Identify a plan to recruit new members and ensure you are communicating to that audience’s needs in your recruitment materials.

Retention

As part of the organization’s process, it will be important to communicate with individuals who decide not to renew so the reason can be identified. When the reasons for not renewing are known, the organization will have an opportunity to try and address these issues, if possible. Another aspect to consider is does the organization have enough opportunities for involvement? If a member doesn’t feel connected to the organization and the people who make up the organization there is a greater likelihood of that member leaving. Further, what level of communication is the organization providing to its members? Are member regularly updated on the organization or industry? Do they know how to get in touch with the organizational leadership? Have you communicated the value of belonging to the organization?

For a sample process related to new and renewing members, please see Appendix I.

Membership Promotional Ideas

* Annual conferences
* Periodic dinner meetings
* Monthly career networking breakfast
* Promotional brochures
* Newsletters
* Local media
* Articles in state publications
  + State Department of Education newsletters
  + Chamber of Commerce newsletters
  + Workforce Development Agency newsletters
  + Other State Associations
* Displays at professional conferences, such as: Superintendents' Conference, Agency Conferences, and Teachers' Convention
* Displays for the general public
* Shopping centers
* State and county fairs
* Letters to potential members
* National Career Development Week Activities
* NCDA poster and poetry contests
* Rebate or other give-aways
* Honorary memberships
* Member-Get-a-Member contests

State Membership Recruitment Kit

Upon request, NCDA will provide a State Membership Recruitment Kit. The kit contains books that can be used for door prizes, NCDA publication catalogs, and NCDA membership brochures. The door prize idea is a great way to collect names of potential state and national members. Contact NCDA headquarters for more information.

NCDA Membership

Benefits of membership in NCDA include the NCDA *Career Developments Magazine*; the *Career Development Quarterly Journal*; the *Career Convergence e-Magazine*, and reduced prices on publications, CEU courses, and conferences. Membership also affords professional identity and a strong legislative voice in the U.S. Congress.

The NCDA Board of Directors may designate individuals as ex-officio members. All except ex-officio members may vote, and all except student and ex-officio members may hold an elective office in NCDA.

A free electronic list for NCDA members within a state will be sent to the State Division president or contact person with the annual NCDA mailing to the states. Additionally, labels are available for conducting a state membership recruitment campaign by contacting NCDA.

Please [click here](http://ncda.org/aws/NCDA/pt/sp/membership) for information about membership categories and cost.

Website

When people hear about an organization, they generally start with the website. Websites can be simple with basic information about the organization or can be quite complex with membership joining and renewal, conference registration, and even client referrals. You may have someone in your organization willing and able to take on the task of developing and maintaining the website or you may need to budget some funds for it.

Social Media

Many organizations expand beyond the website to reach members. There are a plethora of social media options available. It is up to the organization as to which of these tools best meets the needs of its members. Think about your purpose in using social media, survey members to determine preferred social media options and develop a plan to maintain content. Members of the NCDA Social Media Task Force may be able to help!

State Newsletter

Publishing a newsletter is one of the most important functions of a State Division. It is highly recommended that this service be provided and maintained. Easy to use desktop publishing programs allow you to produce your state newsletter in a timely and inexpensive manner and distribution can be done via mail, electronic transmissions, list servs and/or posting to the state website. Newsletters might include informal articles about the professional and personal accomplishments of members, as well as more scholarly pieces about career development issues and best practices.

NCDA maintains a [website](http://ncda.org/aws/NCDA/pt/sp/home_page). You are invited to review the information on the home page and to select portions that your State Division would like to share with members. NCDA grants permission to all of its State Divisions to use information from its website for the purpose of benefiting their members through publishing it in newsletters, on state websites, or other forms of communication.

**Suggestions for Newsletter Features**

* President's Corner
* Upcoming State and National Meetings
* Career Development Month Activities
* New Member Campaign
* Awards Received by Members and/or State Division
* Latest Labor Market Information from the U.S. Dept. of Labor
* Government Related Activities
* State Department of Labor/Workforce Development
* State Department of Education
* State Career Resource Network Association
* State Career Information Delivery System
* Licensure/Certification
* Review of New Career Development Materials
* Poetry by Members or Students
* Activities and Achievements of Members
* Summary of Minutes of State Division Meetings
* Election Ballots and Results

Government Relations

NCDA has a very active [Government Relations](http://associationdatabase.com/aws/NCDA/pt/sp/govtrelations) Committee. We urge each state division to have a representative to the NCDA Government Relations Committee. Contact the chair to add your representative.

**Advocacy and government relations: Become informed and get involved and empower**

Since legislation, policies and regulations have a direct bearing on the professional practice of CDA members, it is important to be aware of their nature and scope; to be informed of their status; and to be proactive in advocating for needed additions or changes in them. Fortunately the NCDA and many of its state divisions have numerous resources and considerable experience in the area of government relations and advocacy. The following sections will offer suggestions for becoming actively involved and provide resource and contact information.

Become informed. It is important to become familiar with the primary federal legislation affecting your professional practice including the Elementary and Secondary Education Act (ESEA), the Higher Education Act (HEA), the Carl D. Perkins Career and Technology Education Act (Perkins CTE), Veterans Employment Transition Programs and the Workforce Investment Act (WIA). Because legislation, policies and regulations at the state and federal levels change, it is important to be aware of reliable sources of information, and to consult those sources on a regular basis. For example, state CDA websites, publications, meetings, conference and workshops often feature useful current information. The NCDA website [www.ncda.org](http://www.ncda.org/) (select About NCDA, and then Government Relations) contains regular legislative updates and references for further information about the status of specific legislation, access to government departments, and Congressional committees and reports. Valuable information may also be obtained from the websites and publications of related professional associations including the American Counseling Association (ACA) [www.counseling.org](http://www.counseling.org/) (Public Policy), Association for Career and Technical Education (ACTE) [www.acteonline.org](http://www.acteonline.org/) (Action Center), American School Counselor Association (ASCA) [www.schoolcounselor.org](http://www.schoolcounselor.org/) (Legislative Affairs) and others.

Get actively involved. There are several steps that you can take to advocate and influence legislation, policies and regulations that affect your professional practice.

* Be aware of the legislation and policies that affect your work through discussions with professional colleagues and communications.
* Gather data about the specific needs of your clients and the resources needed to meet those needs. At the same time, assemble evidence of the effectiveness of your work including data, anecdotes, and examples of best practices.
* Discuss with colleagues, CDA members and others, plans for communicating with elected officials and government workers information about your role and program, and to discuss needed resources, including appropriate legislation and policies. The Government Relations section of the NCDA website has helpful information related to this process.
* Keep track of contacts that are made, evaluate the effectiveness of the contacts, and make note of the extent to which action has resulted from your contact.

Empower Others: There are several steps that you can take to partner and facilitate awareness regarding matters of legislation, policies and regulations related to your profession.

* Encourage colleagues and co-workers to become members of NCDA as well as their state CDA as a way to stay connected with legislative issues in the field. The key to facilitating change and promoting growth is that there is power in numbers.
* Participate in a variety of professional development opportunities (conferences, workshops, etc.) as a way to network with new contacts and maintain relationships with existing partners.
* Share best practices and communicate successes surrounding legislative matters as a way to encourage other CDAs to take action.

CDA members have a clear and convincing story to tell about how our members and associates are involved in the important process of helping individuals plan for and obtain meaningful work, balance work, family and community responsibilities, and advance in their career.

PROFESSIONAL DEVELOPMENT:

Professional Development Ideas

* Day long and half day-Professional Development Institutes or workshops
* Industry tours
* Networking lunches
* Roundtable discussions on career related topics
* NCDA Poster and Poetry contest
* LinkedIn group
* Conferences
* CPP MBTI training workshop
* Dress for Success partnership for community service project
* Webinars (NCDA offers recordings to state divisions)

NCDA Conferences and Events

**NCDA Conference Events for State Division Leaders**

The NCDA Conference offers State Division Leaders many opportunities for professional development and networking. The Conference is an excellent time to meet leaders from all over the country, to discuss issues of importance to our profession, and to participate in the governance of our association. The State Leadership Workshop helps leaders develop their skills; learn about successful strategies, and hear about best practices from other states. Smaller group meetings provide a time for State Leaders to work collaboratively with their peers and NCDA leadership.

**NCDA Professional Development Institutes (PDI’s)**

NCDA is committed to providing high-quality professional development opportunities for our membership. Professional development institutes are scheduled each year as pre/post conference sessions during the annual conference. In addition, NCDA works in collaboration with state association leaders to host one or two regional [institutes](http://associationdatabase.com/aws/NCDA/pt/sp/cpinstitute) each year in conjunction with board meetings. For more information, all scheduled events are posted on the NCDA [website](http://www.ncda.org/aws/NCDA/pt/sp/home_page).

**ACA Regional Meetings**

All State Leaders are encouraged to attend the ACA Regional Leadership Meetings held in conjunction with ACA during the fall. Contact ACA toll-free at (800) 347-6647 for more information and the meeting schedule for your region.

Awards

**National Awards**

Each year, the NCDA offers a wide variety of Awards from various National Committees and Councils. The Awards are presented annually at the NCDA Conference. The deadlines for nominations usually falls in January. State leaders are encouraged to submit nominations in all categories. In addition, the following awards are particularly well-suited for state members or associations.

**NCDA Legislative Award**

To recognize an individual who has made a significant impact on policy or legislation related to the career development profession or to its recipients at the local, state or national level, each of the following areas will be rated: the nature of the work involved; significance of the legislative action; relevance of the legislation to the profession.

**State Awards**

**NCDA State Special Recognition Awards**

Up to four state divisions are recognized each year for their unique contribution, exemplary activities and significant progress as an association. Criteria to be considered may include…

* National Career Development Month Activities
* Workshops and Conferences
* Publications/Newsletters
* Government Relations/Public Policy Efforts
* Membership Development and Recognition
* Public Relations
* Publications/Newsletters/Website
* Service to the Community
* Other Services to Members

It is not necessary to have activities in all suggested areas. Quality, not quantity, of activities will be recognized. Therefore, small state groups have as much opportunity to receive earned recognition as groups with larger numbers or resources.

NCDA Leadership Academy

NCDA seeks several NCDA members to join this hands-on, highly experiential leadership development opportunity designed specifically for promising national and state career development association leaders. NCDA's Leadership Academy will refine and strengthen the leadership skills of those selected for this dynamic program. The ultimate goal of the program is to identify and nurture future generations of NCDA and state Leaders.

The application process is competitive; it is expected that no more than eight NCDA members will be selected for this two-year program! We encourage you to apply for this incredible opportunity and encourage other members of your state leadership team to apply as well.

*Applicants selected to NCDA Leadership Academy will:*

* Attend a series of leadership workshops and training sessions during the NCDA annual conference.
* Learn more about NCDA's history, governance process, and strategic initiatives.
* Meet with current and past NCDA leaders in a small group environment, thereby increasing the opportunity for high quality, one-to-one interactions.
* Learn more about leadership opportunities within NCDA, including leadership positions associated with NCDA committees, special interest groups, and task forces as well as state associations.
* Develop lifelong relationships with other NCDA members interested in leadership opportunities within the national and state organizations.
* Prepare for future leadership positions on the NCDA Board and committees or with state associations.
* Identify a twelve-month *Leadership Action Learning Project* selected from a list of Board and committee identified needs listed at the end of this application or a relevant and related career information topic. Research and complete the project with the support of members of the NCDA Board of Directors. Provide a written report in advance of and short presentation on Project results at the second year annual conference

*NCDA Leadership Academy participants will benefit from:*

* A $500 travel stipend (each year for two consecutive years) to support attendance at the NCDA annual conferences.
* Waived NCDA annual conference registration fees for the two conferences.
* The opportunity to expand leadership potential and explore leadership opportunities through NCDA and state career development associations.
* Ongoing support and mentorship by a member of the NCDA Board of Directors.

For application details, please refer to the [NCDA website](http://ncda.org/aws/NCDA/pt/sp/leadership_academy).All applications received by the deadline will be considered. Selections will be based primarily on an individual's promise for future leadership within NCDA and/or the state level and her or his commitment to the career development profession. Following an initial review of applications, the NCDA Board of Directors reserves the right to conduct phone interviews with applicants to narrow the pool of applicants to the eight who will be selected to join the NCDA Leadership Academy Class.

Career Development Month

One of the most effective ways to involve the members of your State Division in activities is to use National Career Development Month (November) as a focus for various events. Such activities build membership by attracting the attention of career development professionals throughout the state. State Divisions have been successful in getting National Career Development Month proclamations signed by mayors or governors to gain added publicity.

Many State Divisions participate in the National Career Development Month poster and poetry contests and spotlight works done by students from elementary through senior high grades. Other State Divisions have extended their activities into year-long projects involving the media, business and industry, as well as career counselors in a variety of settings. Each year, we have scheduled a National Career Development Week and National Career Development Day. National Career Development Month planning suggestions and materials are available to assist members and State Divisions. For information or additional brochures, contact NCDA toll-free at (866) 367-6232, or check the NCDA website, [www.ncda.org](http://www.ncda.org/) for contact information for the national chair.

**APPENDICES:**

APPENDIX A: Petition of Intent

**Petition of Intent**

We, the undersigned members of the National Career Development Association (NCDA), do hereby petition for application for a charter to establish a state branch of NCDA in the state of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (optional) as a branch division of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Counseling Association, which is this state’s branch of the American Counseling Association.

**Include names, addresses, e-mail, and signature of 20 NCDA and State Division members.**

**DATE SUBMITTED:**

Purpose of this form: This form is to be signed by all members of the Organizing Committee and mailed to the Trustee for State Divisions.

APPENDIX B: Application of Chartering Intent and Sheet for Signatures

1. Proposed Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Names of Officers:

President: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

President-elect: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Secretary: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Treasurer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Trustees, Directors, etc: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Date of Election of Officers:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Date Officers Assume Office: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Current Status of ACA State Branch Affiliation (Check one):

\_\_\_\_\_Have become officially affiliated with the State Branch

\_\_\_\_\_Have applied for affiliation with the State Branch

\_\_\_\_\_Plan to apply for affiliation with the State Branch in the near future

\_\_\_\_\_Other (please explain)

6. Plans for Statewide Meetings

\_\_\_\_\_Plan to meet monthly

\_\_\_\_\_Plan to meet two or more times per year

\_\_\_\_\_Plan to meet in conjunction with the annual meeting of the State Branch

\_\_\_\_\_Other (please explain)

We, the undersigned, as current members of the (enter the state name) \_\_\_\_\_\_\_\_

Career Development Association who also hold membership in the National Career Development Association, submit this application for a Charter as a State Division of the NCDA. (Each member must sign the list below and provide their NCDA membership ID number).

Submitted by: Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IMPORTANT: Attach a copy of the Bylaws and a complete list of members. This form will be reviewed by the Board of Directors and presented at the Annual Meeting.

|  |  |  |
| --- | --- | --- |
| NAME | SIGNATURE | NCDA MEMBER # |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
| 6. |  |  |
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| 20. |  |  |

APPENDIX C: State Chartering Grant

**Summary:**

For new state CDAs, the state chartering grant will be in the amount of $1,000. There are stipulations regarding how this money can be utilized in the establishment of the state CDA.

**Guidelines:**

* NCDA will pay for federal and state non-profit incorporation.
* With the funds remaining after the non-profit status incorporation fees have been subtracted from the $1,000 amount, NCDA will reimburse for acceptable expenses to start a state CDA. These may include marketing materials, event costs, membership drives, websites, etc.
* To receive this money, new state CDAs must have one professional development event for their members in the first year of existence and complete the state chartering grant application form.

**Questions:** If you have questions about what constitutes acceptable expenses, contact the State Trustee.

**Effective Date:** March 1, 2016

APPENDIX D: State Leadership Report

**Purpose -** Each year, NCDA publishes a National Leadership Directory that provides contact information for the State Division Leadership. It is a rich resource for state leaders who might want to network with their colleagues in neighboring states or throughout the country. This information, along with a link to state websites, is also available at the NCDA website at www.ncda.org. To support your efforts in recruiting new State Division members, we will send you a set of labels for the NCDA members in your state after we receive your report. We thank you in advance for your cooperation in providing this important information.

**Report Deadline: Upon election of new officers or September 1 each year**

**Mail or Fax Report to:**

National Career Development Association

305 N. Beech Circle

Broken Arrow, OK 74012

Fax (918) 663-7058 or E-Mail info@ncda.org (Toll-free: 866-367-6232)

**NCDA STATE DIVISION LEADERSHIP REPORT**

***Mail to: 305 N. Beech Circle, Broken Arrow, OK 74012***

***Email to: info@ncda.org; Fax to: 918-663-7058***

1. Name of State:\_\_\_\_\_\_\_\_\_\_\_Name of State Division: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Date this report was completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Name of person completing this report: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Are you an NCDA chartered state division? Yes \_\_\_\_\_ No \_\_\_\_\_\_
5. Fiscal year for your association (for example, 8/1 to 7/31):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. Number of members in your association:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. Date and location of your state counseling association conference and state career development association conference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
8. Does your state have a website? \_\_\_ yes \_\_\_ no

If yes, please list the URL \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. President or Contact Person

Name

Institution

Address

Phone Email

M. President-Elect

Name

Institution

Address

Phone Email

N. Newsletter Editor

Name

Email

O. National Career Development Month Contact

Name

Email

P. Government Relations/Legislative Contact

Name

Email

What are your annual dues? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How are they collected?

* By the State Counseling Association
* Direct by your division
* Other (please explain)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you connected to your state counseling association? \_\_\_ Yes \_\_\_ No

Please check your state divisions posting on the NCDA website at <http://ncda.org/aws/NCDA/pt/sp/about_divisions>. The contact information will be changed once this report is received. If any changes/additions are needed, please indicate it below.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Thanks for your cooperation in preparing this important report.*

APPENDIX E: Budget Template



APPENDIX F: Sample Executive Board Position Descriptions

(Courtesy of the Missouri Career Development Association – MoCDA)

**PRESIDENT**

**Summary:**

Provides leadership to the organization to achieve goals and maintain forward progression of the organization

**Responsibilities:**

* Attend Board meetings
* Guide organization to achieve goals set by the Leadership Board
* Lead Executive Board meetings
* Provide oversight that year-end (fiscal) finances and accounting are sent to Accountant. Treasurer has primary responsibility for this
* By December, collaborate with Past President and other volunteers to begin developing a nomination ballot for new officers
* Identify opportunities for collaboration
* Continuously seek opportunities to network to further recognition of the organization and recruit members
* Maintain archive of important materials for continuation of organization
* Send out communication to general membership as appropriate to relay progress and goals reached
* Develop agenda for Executive Board meetings
* Submit Leadership Report to NCDA Headquarters by September 1st of each year
* Contribute monthly to MoCDA LinkedIn discussion group
* Representative to ACAM or designate representative
* Document tasks for ease of transition for successors

**Skills Needed:**

* Ability to lead diverse group
* Ability to delegate to MoCDA Leadership Board
* Strong interpersonal and communication skills
* Ability to set goals and create a vision for the organization
* Organization skills
* Ability to network and recruit for organization
* Strong project management skills
* Excellent follow through ability

**Term Length:**

1-year term (May 1st-April 30th)

**PRESIDENT-ELECT**

**Summary:**

Provides assistance with leadership for the organization and supports President, Boards and Committees with implementation of mission and programs

**Responsibilities:**

* Attend Board Meetings
* Performs presidential responsibilities when the President is not available
* Assists President with presidential and other specified duties (see President job description)
* Works closely with President to develop and implement succession plans for Board and Chair positions
* Maintains accurate list of committee members and contact information to include name, addresses, phone numbers, fax numbers and e-mail. Update and distribute as required.
* Facilitates Leadership Board meetings and collaborates with President on agenda
* Recruits committee chairs
* Prepares annual budget for following year
* Supervises planning of Annual Conference (once this becomes a reality)
* Prepares schedule/calendar for the following year
* Performs other responsibilities as assigned by the Board
* Document tasks for ease of transition for successors

**Skills Needed:**

* Ability to lead diverse group
* Ability to delegate to MoCDA Leadership Board
* Strong interpersonal and communication skills
* Ability to set goals and create a vision for the organization
* Organization skills
* Strong project management skills
* Excellent follow through ability

**Term Length:**

1-year term (May 1st-April 30th)

**PAST PRESIDENT**

**Responsibilities:**

* Attend monthly Board meetings
* Serve as Chairperson of the MoCDA Nominations and Elections Committee
* Assists in recruitment of members for leadership positions
* Conducts election and tabulates/reports results
* Document tasks for ease of transition for successors

**Term Length:**

1-year term (May 1st-April 30th)

**SECRETARY**

**Summary:**

The Secretary keeps records of the Executive and Leadership Board meetings and distributes those to the Board members.

**Responsibilities:**

* Attend monthly Board meetings
* Maintain accurate account of meeting proceedings including attendees, topics discussed, major input, outcomes and follow-up
* Distribute meeting minutes to Board members for review and approval no later than 2 weeks after meetings
* Maintain Executive and Leadership Board rosters including name, addresses, phone numbers, fax numbers and e-mail. Update and distribute as required.
* Arrange for a fill-in Secretary if unable to attend meeting
* Assist President in tracking meeting discussions and ensure open items are closed
* Maintain virtual document storage system
* Document tasks for ease of transition for successors

**Skills Needed:**

* Attention to detail
* Organizational skills
* Strong written and oral communication skills
* Excellent follow through ability

**Term Length:**

2-year term (May 1st-April 30th)

**TREASURER**

**Summary:**

Oversees the financial aspects of the organization and maintains the financial accounting.

**Responsibilities:**

* Attend monthly Board meetings
* Collect all money for the organization, keeps an accurate account of money spent and disbursed, and present financial reports at each Board meeting
* Transfers money from PayPal account to bank account at least once a month
* Connect with Accountant to prepare for end of year review/audit –April of each year
* Submit audit report to Executive Board for review
* File 990-N to IRS by May 31st of each year
* Recommend to Executive Board any needed modifications in procedures for managing fiscal affairs of organization
* Assist in preparation of budget for organization and committees
* Maintain historical records and tax documents
* Document tasks for ease of transition for successors

**Skills Needed:**

* Attention to detail
* Ability to work with numbers
* Organizational skills
* Excellent follow through ability
* Strong written and oral communication skills

**Term Length:**

2-year term (May 1st-April 30th)

APPENDIX G: Sample Committee Chair Descriptions

(Courtesy of the Missouri Career Development Association – (MoCDA)

**MEMBERSHIP CHAIR**

**Summary:**

Provide direction and oversight for organization’s membership committee to ensure a welcoming environment for new and returning members.

**Responsibilities:**

* Attend Leadership Board meetings
* Schedule committee meetings as appropriate to move forward with goals
* Responsible for all initiatives involving the solicitation and maintenance of the active MoCDA membership
* Develop ideas for generating new members
* Maintains the master membership list in an Excel spreadsheet program
* Sends a “Welcome Email” to each new member
* Ensures certificates are sent to new members
* Follows-up with every member inquiry on membership
* Sends out updated membership emails via Mo-CDA.org website
* Document tasks for ease of transition for successors

**Skills Needed:**

* Internet access and basic computer skills are required, namely Excel
* Willingness to learn e-mail system through website
* Dedication to visibility within the state career development association
* Excellent organizational skills
* Strong attention to detail
* Ability to recruit volunteers for committee
* Strong written and oral communication skills
* Ability to delegate
* Determine vision for committee
* Excellent follow through ability

**Term Length:**

2 year term (May 1st-April 30th)

**COMMUNICATIONS CHAIR**

**Summary:**

Provide direction and oversight for organization’s communication efforts to ensure communication with the membership

**Responsibilities:**

* Attend Leadership Board meetings
* Schedule committee meetings as appropriate to move forward on goals
* Working with web developer and/or maintaining the MoCDA website with pertinent articles, events, and member information
* Marketing MoCDA to members, prospective members, and the general public
* Gathering information, presentations, etc. from members to share on the website
* Creating a quarterly newsletter to maintain an informed organization
* Brainstorming new ways to market the MoCDA, including written materials, marketing through NCDA and other related organizations
* Document tasks for ease of transition for successors

**Skills Needed:**

* Strong organizational skills
* Willingness to learn technology related to the website
* Ability to recruit volunteers for committee
* Excellent written and oral communication skills
* Ability to delegate
* Determine vision for committee
* Excellent follow through ability

**Term Length:**

2 year term (May 1st-April 30th)

**PROFESSIONAL DEVELOPMENT CHAIR**

**Summary:**

Provide direction and oversight for organization’s professional development to engage membership in organizational events.

**Responsibilities:**

* Attend Leadership Board meetings
* Schedule committee meetings as appropriate to move forward with goals
* Assess needs and preferences of membership for annual professional development opportunities
* Manage the LinkedIn group including accepting members and sending out invitations
* Facilitate discussion within LinkedIn group
* Update professional development section of website either directly or by coordinating update with designated webmaster
* Partner with Executive Board to determine conference date, times, presentation topic, format, fees, and budget
* Reserve conference facility
* Determine and meet necessary criteria to become eligible for CEUs
* Establish subcommittees and recruit volunteers (i.e. Marketing, Registration and CEUs, Set up, Technology, Refreshments, Raffle, Take down)
* Document tasks for ease of transition for successors

**Skills Needed:**

* Excellent organizational skills
* Strong attention to detail
* Ability to recruit volunteers for committee
* Strong written and oral communication skills
* Ability to delegate
* Determine vision for committee
* Excellent follow through ability

**Term Length:**

2 year term (May 1st-April 30th)

APPENDIX H: Checklist for Starting New State Chapter

**Getting Started**

Forming a non-profit corporation is an involved process. Requirements vary by state, so please consult your Secretary of State’s office for more details.

**Determine if you need to start a non-profit for your state chapter:**

This decision will be based on your chapter’s goals, your state requirements, and the availability of other local non-profits that may have the ability to collaborate. Determine if this is the fastest, easiest, and best option for your chapter or if you should seek alternative routes.

**Determine your goals for the chapter:**

Decide on your mission, operations, and other activities that would be ideal for your chapter. Most professional organizations will fall under characteristics of the 501(c)(6) organization category which is “an association of persons with a common business interest which promotes the common interest and which does not conduct a regular trade or business for profit.” [CITE] Involvement in political campaigns, lobbying, and general advocacy is allowed under this type of organization.

However, there are a variety of other 501(c) organizations that might better fit your chapter’s goals. IRS Publication 557 outlines all of the options for tax-exempt organizations.

**Recruit board members:**

Your board members will assist in all initiating functions of your new chapter. For instance, board members can participate in strategic planning, creating documents, fundraising, and other activities.

**Check for organization name availability:**

Some states will not allow more than one organization of the same name and have a procedure to check if your chapter name is available for use. In addition, you may be able to apply to reserve the name of your choice, although this typically has an associated fee.

**Write an organizing document:**

For non-profit corporations, you will create Articles of Incorporation. For unincorporated associations, you will create Articles of Association. It is your choice as to which document you will create. Most organizations that plan to incorporate within their state will need Articles of Incorporation. Many states provide a form or guide outlining the requirements for the state Articles of Incorporation. You may also choose to consult an attorney for assistance with creating this document.

**Draft bylaws:**

Bylaws serve as the “rule book” for your organization. Bylaws can be quite flexible in how they’re written, however, some states have requirements for this document as well. Again, consulting an attorney can assist with ensuring the bylaws meet your state’s requirements.

**Create a business plan with a budget:**

Create a plan for how you plan to generate and use your funds. Consider sources of income including membership, grants, sponsorships, etc. Think about programs and services you plan to provide to your membership in addition to operating costs for marketing, websites, mailings, etc.

**Incorporate as a non-profit corporation:**

Incorporating makes your chapter an official non-profit corporation within your state. If you plan to incorporate, do so following the requirements specific to your location. These guidelines are most often found through the Secretary of State. Keep in mind that incorporating within your state will provide you with a charter number, but not a tax identification number and will not give you tax-exempt status within your state or with the IRS. Separate forms will need to be submitted for these. There is typically a fee for incorporation.

**Apply for Federal Employer ID Number (EIN)/Tax Identification Number (TIN):**

Also known as a tax identification number (TIN), the EIN acts as the identifying number for your organization and will allow you to open bank accounts, file tax paperwork, and perform other functions for your chapter. Apply for an EIN through the IRS website or by submitting IRS Form SS-4.

**Apply for a tax identification number in your state (if needed):**

If your organization’s operations will involve selling products or services that are subject to sales tax, if you will be employing individuals for monetary compensation and would be subject to payroll tax, or any other tax within your state, you may need to apply for a state tax identification number as well.

**Apply for sales tax exemption from your state (if needed):**

If you are not automatically eligible for sales tax exemption through incorporating within your state, you will need to apply. Again, requirements will vary by state.

**Apply for income tax exempt status from the IRS:**

Non-profits incorporated in the state are not automatically tax exempt. Chapters wanting to apply for 501(c)(6) status will need to fill out IRS Form 1024 and submit a filing fee. Other 501(c) statuses may require other forms. Procedures are outlined in IRS Publication 557. The review and approval process for tax exempt status is lengthy.

**Create policies in compliance with the Sarbanes-Oxley Act**:

The Sarbanes-Oxley Act of 2002 (Public Company Accounting Reform and Investor Protection Act), in an effort to decrease fraudulent financial activity, provides for corporations to create a variety of documents that outline responsible practices. Although most of these documents are not required for non-profit corporations, there are two exceptions: whistleblower protection policy and document retention policy. A variety of samples exist online.

**Staying Current**

In order to maintain your tax exempt status, you will need to provide information on an annual basis.

**Annual Filing:**

The IRS requires annual reporting through submitting a form such as Form 990, Form 990EZ, or Form 990-N (also known as the e-postcard). Many states will also require submission of an annual filing or registration report.

**NCDA Requirements:**

* Develop an organizing committee
* Petition of Intent
* By-laws
* Application for State Division Charter
* Apply for state chartering grant

Adapted from Missouri Department of Economic Development, Business and Community Services. Checklist for Forming a Nonprofit Corporation.

Courtesy of the Missouri Career Development Association (MoCDA)

APPENDIX I: Sample New and Renewing Members Process

(Courtesy of the Missouri Career Development Association – MoCDA)

**MoCDA New Member Registration Process**

The process for establishing a new member of MoCDA is as follows:

* When a new member registers, a form will be submitted either via the MoCDA website or a paper form. The Membership Chair will receive a copy of this new member registration form either via email (in the case of an online form submission) or from the Treasurer (in the case of a paper form submission).
* On a weekly basis, the Membership Chair will input all new member registration form information into the “Interests” tab of the MoCDA Membership spreadsheet housed within the Membership section of the MoCDA Google site.
* On a weekly basis, the Treasurer will check payment of all new members entered into the “Interests” tab of the MoCDA Membership spreadsheet. When payment is confirmed:
  + The Treasurer will move the member information from the “Interests” to the “Actives” tab.
  + The Treasurer will update the membership effective date from the month/year in which a new member registration form was received to the month/year in which payment was received and confirmed, if these months/years are not the same.
  + The Treasurer will notify via email the Communications and Membership Chairs of new member payment, triggering action by both Chairs:
    - The Membership Chair sends a welcome email to the new member, with a PDF membership certificate attached. The Membership Chair will copy a membership committee member, who will then share the MoCDA LinkedIn group with the new member using the following content:

*“Hi [First Name],*

*Thanks for joining MoCDA!! As a representative of the Membership Committee, I would like to offer the opportunity to connect with MoCDA via our LinkedIn group. Here you will be able to connect with current members, discuss trends in career development, and stay up-to-date with the happenings within MoCDA.*

*I look forward to “seeing” you in our group!*

*[Full Name], Membership Committee Member*

* + - The Communications Chair adds the new member into appropriate e-mail distribution subscriber groups.

The Membership Chair will process new member registration forms on Tuesdays.

Treasurer will confirm payments on Wednesdays.

Communications Chair will add new members to email subscriber groups on Fridays.

**Renewing Membership Process**

The process for renewing membership in MoCDA is as follows:

* The Membership Chair will send membership renewal emails to MoCDA members three times; once in the month prior to membership expiration, once in the month of membership expiration, and once in the month after membership expiration.
  + When reminders are sent, a note of the date will be made in the “Reminders” columns of the MoCDA Membership spreadsheet housed within the Membership section of the MoCDA Google site.
  + When the first reminder is sent, the Membership Chair will clear content in the Amount and Payment Type columns.
* When a member completes a member registration form, a form will be submitted either via the MoCDA website or a paper form. The Treasurer will receive a copy of this member registration form.
* On a weekly basis, the Treasurer will check payment of all members who have submitted a member registration form.
  + When payment is confirmed, the Treasurer will update the membership effective date in the MoCDA Membership spreadsheet to year and month in which payment was received.
  + The Treasurer will complete the Amount and Payment Type columns in the MoCDA Membership spreadsheet.
  + The Treasurer will notify via email the Communications and Membership Chairs of renewed membership.
* On a weekly basis, the Membership Chair will send confirmation emails to all members who have renewed their MoCDA membership.
  + The Membership Chair will copy a membership committee member. The committee member will check the MoCDA LinkedIn group to determine if the renewed member is currently a member of the MoCDA group. If not, the committee member will share the MoCDA LinkedIn group with the renewed member using roughly the following content:

*“Hi [First Name],*

*Thanks for your recommitment to MoCDA!! As a representative of the Membership Committee, I would like to offer the opportunity to connect with MoCDA via our LinkedIn group. Here you will be able to connect with current members, discuss trends in career development, and stay up-to-date with the happenings within MoCDA.*

*I look forward to “seeing” you in our group!*

*[Full Name], Membership Committee Member”*

The Treasurer will confirm payments on Wednesdays.

The Membership Chair will send renewal e-mails on Thursdays.

**Removing Expired Memberships**

A member will be considered a past member of MoCDA after:

* Three email reminders have been sent to the member: once in the month prior to membership expiration, once in the month of membership expiration, and once in the month after membership expiration.
* An additional month has passed after the final email reminder was sent.
* For example: A member whose membership effective date is October 2010 would receive an email reminder to renew in September, October, and November, and his/her membership would be terminated in December 2011.

The process for moving a member from active status to past member status is as follows:

* The Membership Chair will move the member’s information from the “Actives” tab in the MoCDA Membership spreadsheet to the “Past” tab.
* The Membership Chair will alert the Communications Chair via email when a member has failed to renew within the timeframe outlined above and moves from active to past member status. The Communications Chair will remove the past member from active member email subscription groups.

**APPENDIX J: Requirements for State Division Continuing Education Units**

NCDA’s continuing education is approved through many state licensing boards for state specific continuing educational requirements. Other organizations/associations may also accept NCDA’s certificates. Please check with your state to clarify what is needed in addition to a completion certificate from NCDA.

NCDA provides continuing education (CE) support to state division sponsored events including workshops, annual conferences, and other professional development opportunities. This is a free service to NCDA state divisions. Unfortunately, NCDA is not able to support CE support for individual members’ companies or members who may be vendors. Individual members may seek to become continuing education providers through NBCC by visiting www.nbcc.org.

To gain approval for continuing education for your state division-sponsored event, NCDA’s management team will need to review the event for career development content and presenter eligibility. Simply send the following information to info@ncda.org at least two weeks before the start of your professional development event:

* Title of Event and Date of the Event
* Sponsor(s) of the Event
* Detailed timeline of all activities within the event. Include all planned break times, meal times, content time, association-specific business meeting time, etc. This will help with the assignment of contact hours
* Annotation and learning objective for each content session (keynotes, breakout presentations, roundtables, etc.) and which competency or competencies will be covered; the NCDA Career Competencies and GCDF Competencies are listed on www.ncda.org under Guidelines.
* Name and contact information for CE chair
* Name, credentials including degree level, and bio for each presenter.
* When approved, NCDA will provide a sign in-out sheet, to verify enrollment, a completion certificate template, and an evaluation form. Complete instructions will also be provides so that each state can provide continuing education for its members.

For more information, contact Brianna Navaro at info@ncda.org.

**APPENDIX K: State Division Webinar Collaboration**

NCDA offers its professional development webinar series to state divisions. This will allow NCDA’s webinars to reach new state audiences and allow state divisions to expand their professional development outreach without the cost of technology or programming.

NCDA offers four new webinars per year. The webinar presenters are selected by the NCDA Board based on relevancy of the topic, expertise from high profile NCDA members, and marketability of new NCDA publications. They are all hosted “live” and recorded for future use by NCDA members. Continuing education is provided free for “live” webinar attendees and is offered also to those viewing the recorded version from the NCDA website for a fee.

NCDA is offering its state divisions a license to utilize these recordings. States may charge members for viewing and/or continuing education or may opt to offer them free as a member benefit. Additional information is provided below:

1. NCDA will provide the state division recording links to all past NCDA webinars (ten in all) along with a CE certificate template. States may either post the links to state websites or simply direct a state link to the NCDA site for viewing.
2. NCDA will provide the state division recording links of all future webinars three-months after its initial viewing. This will keep the integrity of the national registration and eliminate potential conflicts between a live offering and a state division offering.
3. States will be responsible for marketing this opportunity to their members and personalizing and disseminating the completion certificates to its members who view the webinar (for a charge or for free).
4. States will be responsible for keeping a list of members who are issued a completion certificate. In the event that NCDA asks for verification a participant, you will need a paper trail to ensure the accuracy of webinar completers.
5. States will be asked to provide a contact name to NCDA Headquarters for each webinar and continuing education coordination via their annual State Division Leadership Report.
6. The cost for this state division benefit is:
   1. $500 for an annual license (4 new webinars per year) OR
   2. $200 for an individual webinar
   3. Regardless of which option you choose, NCDA is offering the 10 past webinars at no cost for any state division that signs up for this benefit.

If you have any questions, please contact Brianna Navaro at info@ncda.org or call 918-663-7060.