

# CALDA CHAPTER FORMATION GUIDELINES

The CALDA Board has devised the following criteria for chartering a local CALDA Chapter.

The proposed Chapter organizer shall submit an application to CALDA's vice president, who shall discuss the application with the Executive Board. The Executive Board will then approve or deny said application. The Executive Board may refer the application to the entire Board if, in their discretion, such action is necessary.

Requirements for a chartered CALDA Chapter:

1. At least five potential chapter members are required for an application.
2. The organizer of the Chapter will be a CALDA member in good standing for at least one year preceding submission of the application.
3. The Executive Board (or the full Board if the application was so referred) will consider all applications for approval and shall take any factors into consideration they deem relevant and reserves the right to deny any application at its sole and absolute discretion.
4. After chartering, the Chapter shall meet regularly at least one time per month. The Chapter shall hold an election to name officers at its first meeting: president, secretary, treasurer.
5. The secretary of the Chapter shall keep minutes of each regular meeting. The minutes shall be submitted to CALDA's secretary monthly, within 30 days of each preceding meeting.
6. The president of the Chapter shall submit a quarterly progress report to the Board as to how the chapter is effectively furthering the Mission and ideals of CALDA. Said progress report shall be due at least 10 days prior to regularly scheduled CALDA Board meetings.
7. The Board reserves the right and absolute discretion to revoke a Chapter's charter if, in the Board's judgment, the Chapter fails to operate in a way that is not in line with CALDA's Mission Statement, does not follow the basic requirements of operating a chapter, or is otherwise detrimental to CALDA.

## PROCEDURE FOR STARTING A NEW CHAPTER

1. Find a location - the more businesslike the better, rather than a restaurant, such as:
  - A LDA's office
  - A conference room in a building where you have an office
  - A law library
  - A room set aside in a restaurant that is private
2. Set a date – Choose a date that is consistent, i.e., the first Tuesday of the month, the third Thursday of the month, etc. When there is consistency people can block their calendars months in advance and set their schedules accordingly. The importance is, that no matter how many members attend, the meetings should be held for the benefit of those who do show up.
3. Set a time – Lunch meetings usually work well. Meetings should be so well organized that they last only one hour, however, there are instances where this is not always possible. When members realize they will only have to leave their businesses for an hour, they are more likely to attend. It's a good idea to continue what didn't get finished at one meeting, to the next. This way you are sure to cover a particular subject thoroughly, rather than leave something hanging because time ran out.
4. Contact members – Post your meeting on the Forum at least a week in advance with all the details; place, date, time, agenda, etc.
5. At the first meeting – Elect officers; president, secretary, treasurer. The president then asks members what topics they are interested in for future meetings. Some members will have more experience than others and can be presenters at future meetings. For example: someone may be proficient in Guardianships and the other members would like to know more about this procedure. Same with any other topics that draw interest. Schedule the presenters for future meetings.

Other sources are also very important: court clerks (how can we make their jobs easier), attorneys who are LDA-friendly, judges, mediators, facilitators, anyone we deal with that can shed light on any aspect of our profession that is of interest. Ask members if they know of anyone who is interested in speaking at a meeting and have them contact that person to schedule an appointment. The more you involve the members the better.

At the beginning of every form-change month, devote the meeting to going over the new forms. These meetings are to disburse as much information as we can to each other, so

when someone knows of changes in procedure at certain courts they should alert the members and share the information.

6. Dues – The Bay Area Chapter charges \$2.00 for CALDA members and \$5.00 for non-CALDA members. Non-CALDA members are allowed two free meetings. Dues are kept in the chapter for their activities, such as: marketing expenses, lunch for speakers, advertising materials for certain events, participation in street fairs, etc. Treasurer should give a report at least every two months.
7. Sign In Sheet – Members sign in at every meeting. Sign in sheet is then turned over to secretary, who attaches it to the minutes.
8. Minutes – The secretary takes minutes and then disburses them to the members via email, as well as to the present CALDA secretary. A hard copy is printed out for each member (I make 10 copies) and handed out at the next meeting for approval by the members.
9. CALDA Educational Units – This form is passed around to each member to fill in and then signed by the president. Each one hour meeting is worth one educational unit and is recorded on the form. Members keep these forms and can turn them in to the CALDA membership chair to satisfy educational units.
10. Miscellaneous – In December our chapter has a Christmas party. Everyone brings an hors d'oeuvre, drinks (non-alcoholic), and a grab bag prize. It's a great way to end the year!

GOOD LUCK!

CALDA's Board of Directors