

CALDA CHAPTER GUIDELINES

Formation of a new CALDA Chapter

1. The organizer of the Chapter will be a CALDA member in good standing.
2. At least five potential chapter members are required to be named on the charter application. All parties must be current CALDA members in good standing.
3. The proposed Chapter organizer shall submit the application to CALDA's Chapter Liaison (or, in their absence, the Vice President), who shall bring the application to 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 opinion, such action is necessary.
4. The Executive Board (or the full Board if the application was so referred) will consider all applications for approval, shall take any factors into consideration they deem relevant, and shall reserve the right to deny any application at their sole and absolute discretion.

Policies and Procedures for CALDA Chapters

1. After chartering, the Chapter shall meet regularly at least one time per month to promote the mission and standards of CALDA.
2. The Chapter shall hold an election to name officers at its first meeting: president, secretary, and treasurer. The Chapter president will have been a member in good standing of CALDA continuously for a minimum of one year prior to being elected to office. The Chapter can determine if the annual term of office will expire at the end of the calendar year or on the anniversary date of the Chapter charter.
3. 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.
4. The president will submit all requests to grant MCLE for meeting topics to the CALDA Education Chair at least one week prior to the event.
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 secretary will submit a roster of attendance (sign in sheet) to the CALDA Admin Office for the issuance of MCLE certificates.
7. The treasurer will report to the Chapter monthly and to the Board on a quarterly basis.
8. Attendance by non-CALDA members at Chapter Meetings is limited to two meetings. If MCLE credit is to be granted to a non-CALDA member, the cost is \$25 per hour, payable to CALDA.
9. Any relevant Chapter updates for the CALDA website should be submitted to the CALDA Admin Office as needed.
10. CALDA will maintain ownership of all CALDA related website pages and social media accounts. Chapter officers or members may be assigned as editors or administrators.
11. The Board reserves the right and absolute discretion to revoke a Chapter's charter if, in the Board's judgement, the Chapter fails to operate in a way that is in line with CALDA's Mission Statement, does not follow the basic requirements of operating a chapter, or is otherwise detrimental to CALDA.

Tips for Starting a New Chapter

1. Find Chapter Members. Check the Member Director for local CALDA members and reach out personally. Request an email blast to members in your target area to announce your new Chapter.
2. Find a Location. The more businesslike the better: LDA office, conference room, law library, private room in a restaurant, or a virtual meeting space.
3. Set a Date. Choose a date that is consistent, i.e. the first Tuesday of the month. When there is consistency, people can block their calendars months in advance and set their schedules accordingly. No matter how many members attend, the meetings should be held consistently for the benefit of those who do show up.
4. 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 or preferred. Keeping the meeting within the scheduled time frame will promote attendance. If you are unable to finish a subject thoroughly, table it to the next meeting.
5. Contact Members. Before each meeting, post on the Professional LDA Exchange (forum), social media, or ask the Admin Office to be included in the Weekly Note. Set up a Google group for your Chapter for easy group communication.
6. At the First Meeting. Elect officers: president, secretary, treasurer. Determine the best meeting time/date/place.
7. Meeting Topics/Speakers. Determine what topics members are interested in for future meetings. Some members will have more experience than others and can be presenters. For example: someone may be proficient at Guardianships and can share their expertise.

Other sources are also very important: court clerks, attorneys, judges, mediators, anyone LDAs deal with that can shed light on any aspect of the profession. Ask members what contacts they have that may be interested in speaking and what topics they find most relevant. The more the members are involved, the better.

Another helpful tip: at the beginning of every form-change month, devote the meeting to going over the new forms.

8. Dues. Some chapters charge a small fee (i.e. \$2-\$5 for CALDA members and \$5-10 for non-members.) As local Chapters are a perk of CALDA membership, non-CALDA members are allowed to attend a maximum of two Chapter meetings, after which they must join CALDA if they wish to continue attending. Dues are kept in the Chapter and used for their activities, such as: marketing expenses, meals for speakers, advertising materials for certain event, etc. The treasurer should report monthly to the Chapter and quarterly to the Board regarding current Chapter funds.

9. CALDA Educational Units (MCLE). All suggested MCLE topics must be approved by CALDA's Education Chair to receive MCLE credit. A California State Bar MCLE attendance sign-in sheet will be filled out for all MCLE sessions held in person. The Chapter secretary will submit the form to the CALDA Admin Office and members will receive their MCLE certificates from the Office via email. If conducted online (i.e. Zoom), a report verifying attendance will be downloaded. All attendance reports are kept on record at the Admin Office.

10. The CALDA Chapter Liaison is a current Board Member who is well versed in the formation and the policies and procedures for running a Chapter. If you have any questions, need ideas, or are having challenges within your Chapter, your first point of contact should be the Chapter Liaison.