

CLSA
CALIFORNIA LAND SURVEYORS ASSOCIATION

**CHAPTER
HANDBOOK**

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Section 1: Introduction

Professional organizations are successful when all parties involved receive some measure of value from the efforts and/or funds they invest. The perceived value can be very different for each member. Some members want discounts on items such as publications, office supplies, insurance and education. Others measure the value of membership by their ability to make professional contacts and networking opportunities. The success of CLSA depends upon the satisfaction of the members, and to a great extent, the satisfaction of the members is dependent upon the success of the local chapters.

This handbook is intended to provide as much information as possible to assist local leaders with the successful operations of local CLSA Chapters. This handbook is a set of guidelines, not regulations. As such, this document is dynamic and will change over time. We encourage your feedback and suggestions.

Section 2: Purpose of Chapters

1. What is a CLSA Chapter?

A CLSA Chapter is an integral part of the Association. As set forth in the CLSA Bylaws, except in the case of student chapters, each chapter shall have ten or more members who are also Corporate Members of the Association.

2. Importance of CLSA Chapters

Successful local chapters are critical to the overall success of CLSA. We know that members want the ability to meet with their peers, attend professional development events and participate in leadership opportunities all of which local chapters can provide.

Section 3: Establishing a CLSA Chapter

Local chapters are central to the fulfillment of the CLSA's objectives. Through chapters, CLSA members can network with other land surveying professionals.

Individuals wishing to start a CLSA Chapter must meet minimum requirements as outlined in Article VIII of the CLSA Bylaws. Below are excerpts from the CLSA Bylaws pertaining to formation of a Chapter. Please contact the CLSA Central Office at (707) 578-6016 or clsa@californiasurveyors.org for more information.

CLSA Bylaws

Article 8, Section 8.03, Formation of Chapter

With the approval of the Board of Directors, any group of ten or more Corporate Members of the Association may organize a chapter of this Association. Geographic boundaries need not be considered. The name of the chapter shall readily identify it as a subsidiary organization of the Association. The members of a proposed chapter may meet, elect officers, draft bylaws, and otherwise engage in the formation of such chapter under the direction and guidance of any director of the Association serving as an organizing agent.

Article 8, Section 8.04, Organizational Report of Chapter

The proposed chapter shall submit to the Board of Directors of the Association a membership roster, the names of its officers, its proposed bylaws, and a report of its organizational meeting.

Article 8, Section 8.05 Approval of Chapter

If its bylaws, functioning principles, and purposes are consistent with those of the Association, then the Board of Directors may charter the proposed chapter as a subsidiary organization of the Association.

FIRST STEPS

There are probably many ways to kick-off a chapter. It can be simple or complex but the basics are straight forward – just keep the ball rolling:

- 1) Determine there is adequate interest in forming a CLSA Chapter.
CLSA Central Office can provide a list of licensed land surveyors in the chapter's geographic area. Use this list to contact potential chapter members and determine if there is interest in formation of a local chapter.
- 2) Start an Executive Committee
 - a) Collect 5 to 10 CLSA members to serve as the Executive Committee.
 - b) Everyone commit to supporting the effort for a minimum of one year.
- 3) Hold a startup or organizational meeting.
The startup meeting can be used to establish the first presence in the community. It provides an opportunity for potential members to express their interest in the new chapter. Several tasks must be accomplished prior to holding a startup meeting, including, but not limited to, the following:
 - a) Determine a location to hold a meeting. The meeting location should be convenient for the majority of the potential members in the chapter's geographic area.
 - b) Arrange for refreshments or a light meal.
 - c) Promote the meeting. CLSA Central Office can post a notification on the CLSA Event Calendar and provide a mailing list. Send a mailing to potential members in the local area announcing the potential formation of a new chapter. Be sure to invite the CLSA State Officers and a representative from the CLSA Central Office.
 - d) Develop an agenda for the Startup Meeting (see sample agenda below).

STARTUP MEETING – SUGGESTED AGENDA

The agenda for the start-up meeting should include the following:

- 1) Introduction/Welcome
Be sure to have a sign-in sheet to gather the contact information of each attendee. The Executive Committee should welcome each attendee as they arrive.
- 2) Presentation about CLSA. Consider asking a CLSA State Officer to provide a brief presentation.
- 3) Introduction of the chapter's non-elected Executive Committee and a brief discussion on timeline of chapter formation.
- 4) Decide on a regular meeting place and time. Check with local restaurants, colleges, universities, or businesses. Banks usually have meeting rooms available for non-profit organizations. Education Centers in your area are often available.
- 5) Start an informal discussion regarding the desires and expectations relative to the functioning of the chapter. Emphasize that members are to determine the direction and activities of the chapter.
- 6) Hold elections of chapter officers.

- 7) Allow time for socializing and personal networking. Don't be concerned if all of the above is not accomplished during the initial meeting. Take the organization of the group at a comfortable pace. It may be necessary to hold elections at a subsequent meeting.

SUBMITTING REQUIRED MATERIAL TO CLSA BOARD OF DIRECTORS FOR CHARTER

Once you have held a startup meeting, determined that there is sufficient interest in forming a chapter and elected chapter officers, it is time to request a charter from the CLSA Board of Directors.

In order to obtain your charter, you must submit chapter bylaws as well as an organizational report. This information should be sent electronically to the CLSA Central Office at clsa@californiasurveyors.org

Sample chapter bylaws and an organizational report are included in this handbook for your use.

Section 4: Maintaining a CLSA Chapter

Maintaining a CLSA Chapter takes leadership, individual and group commitment, initiative, and cooperation. As with any volunteer organization, there is a time commitment to make a chapter successful. Chapter leaders share the time commitment, making it manageable for all involved.

Maintaining the successful operation of a CLSA Chapter is an ongoing process. It takes the time and effort of a well-organized Executive Committee. This section is dedicated to processes and procedures necessary to keep a chapter running smoothly.

1. Keys to Success

The key elements of a healthy chapter are the continued growth of chapter leadership and active participation by members. In order to support the mission and purpose of the chapter, a chapter needs to also focus on some functional goals such as:

- 1) Growing membership
- 2) Successful annual elections of leaders and committee chairs
- 3) Identify and secure chapter sponsors
- 4) Consistently hold chapter meetings
- 5) Distribute a chapter newsletter
- 6) Develop and maintain a chapter website
- 7) Utilize the CLSA Central Office and its resources

2. Chapter Meetings

One of the most important elements of a successful chapter is holding consistent chapter meetings. It is recommended that chapters meet monthly at set locations and times. Official minutes should be kept of all general meetings.

3. Sample Meeting Schedule

| | |
|--------------|---|
| 5:30-6:00 PM | Social |
| 6:00-7:00 PM | Dinner |
| 7:00-8:00 PM | Introduction/Welcome of new members and visitors Introduction of speaker/Program |
| 8:00-8:30 PM | Thank Speaker*/Chapter business Door/Raffle Prizes** |

*** Speakers**

Speakers are an important part of CLSA Chapter meetings. A good program will attract new members and keep existing members coming back. The CLSA Central Office maintains a speaker's bureau which you can utilize in developing a program.

Your program speaker is the Chapter's VIP. If a speaker is traveling to your meeting, consider having a chapter member pick them up at the airport, transport to the meeting and back, etc. Be sure to provide complimentary dinner to the speaker and a thank you gift is encouraged. CLSA Central Office has a supply of appropriate speaker gifts.

****Door Prizes**

Door prizes/raffles are a good fundraising mechanism for chapters. Consider a 50/50 drawing to encourage participation from members and raise money for the chapter.

Section 5: CLSA Chapter Leadership

1. What are the Perks of Being a Chapter Leader?

Most of us do not start or work in a chapter seeking personal benefit but everyone benefits from the experience. Simply stated the number of people you meet and the resources they bring with them are invaluable, a reward in themselves. You recognize where and how to obtain people and resources you need. Being a leader is some of the best education you can get.

2. Chapter Leadership Roles

All officers must uphold and enforce the Association's Bylaws, Policies and Procedures.

Duties of the Chapter President

The President is the chosen leader of the chapter. As such, the President will be expected to fulfill (or delegate) the following responsibilities:

1. Responsible for scheduling monthly meetings.
2. Serve as chair and preside at all chapter meetings.
3. Have general charge and supervision of the affairs and business of the chapter.
4. Organize special committees and appoint committee members as authorized by the Chapter Executive Committee.
5. Approve chapter expenses according to policies; review and sign all chapter expense reports.
6. Perform all other duties prescribed by the Chapter Executive Committee.
7. Ensure that all duties vital to the functioning of the chapter are fulfilled.

Duties of Immediate Past President

When a Chapter President has completed his or her term of office, he/she remains on the Chapter Executive Committee for a year as the Immediate Past President.

Duties include:

1. Pass on all materials and knowledge to the newly elected President and be available in an advisory role.
2. Serve as Chairperson of the Chapter Nominating Committee.
3. Perform any other duties prescribed by the Chapter Executive Committee.

Duties of the Chapter Vice President

1. Act for the President during absence or disability.
2. Perform such duties as are delegated by the President or the Executive Committee.

Duties of the Chapter Secretary

1. Prepare and distribute the monthly meeting agenda.
2. Keep a record of the proceedings of Chapter and Executive Committee meetings.
3. Keep accurate historical records of all chapter activities and significant events, including news releases, and accomplishments of the chapter and its members.
4. Perform duties as are delegated by the President or the Executive Committee.

Duties of the Treasurer

1. Encourage the members to pay their membership dues.
2. Ensure that all chapter funds are properly managed and disbursed in the best interest of the chapter's members.
3. Assist Chapter President in approving chapter expenses according to policies.
4. Ensure that the chapter files timely financial reports with the CLSA Central Office.
5. Report on the financial condition of the chapter.
6. Oversee the preparation of an annual budget and any other special project budgets for the chapter.
7. Perform such duties as are delegated by the President or the Executive Committee.

Duties of the Chapter Representative

1. Serves as a member of the Board of Directors.
2. Responsible for submitting quarterly report on the Chapter activities to the Board of Directors.
3. Responsible for reporting actions of the Board of Directors to the Chapter.
4. As the representative serves as a pipeline of information between the Chapter and the Board of Directors, attendance at the quarterly Board of Directors meetings and regular attendance at Chapter meetings is required.

Membership Coordinator

1. Responsible for new member recruitment activities and member retention.
2. Greet attendees at all chapter functions, manage the sign-in sheet, introduce new members to chapter leaders and volunteers, and provide guests with member and chapter information.
3. Encourage CLSA members to take advantage of the benefits and opportunities available to them as members.
4. Perform such duties as are delegated by the President or the Executive Committee.

Newsletter Editor

1. Prepare a newsletter and other information on chapter activities to send to chapter members.
2. Keep the members informed about upcoming events.
3. Seek publicity opportunities for the chapter.

4. Provide the CLSA Central Office a list of all chapter activities so that they may be added to the CLSA Event Calendar.
5. Perform such duties as are delegated by the President or the Executive Committee.

3. Member/Volunteer Management and Motivation

It is not uncommon in any volunteer organization to call for volunteers to run for election or to serve on a committee, and to see everyone immediately start looking at the floor or hiding under their chair. We are all busy people and at times an individual has to move volunteer/association activities a bit down the priority list for the good of career and family. But more often, we simply need to find the proper hot button to motivate a person to overcome their natural insecurity or fear of commitment.

1. Often a one-to-one personal call of a person to a position is a more effective method than simply asking for volunteers at the meeting. This is especially valid if you can truthfully say something like "We considered several names for this position and are convinced that your skill set is what's needed to make it a success.
2. A defined period of service can help many people make the decision to serve. Where appropriate, let the prospect know an exact time when the responsibility will end, or let them know that they will be released at the conclusion of a specific project.
3. It can sometimes border on corny, but we all love to be appreciated and recognized. By rewarding and recognizing those who serve, it will be easier to find future volunteers.
4. Accepting a leadership position can be good for an individual's career. Remind your members of that occasionally.
5. Most members have a sense of duty developed to one level or another. Quietly appeal to that.
6. People want to be involved with success. As you run successful meetings and events, and transmit a sense of enthusiasm to your members, they will have a greater desire to participate more actively in that success.
7. It is a must to maintain an active Nominating Committee to assist in identifying future leaders and encouraging them to serve the chapter. Identify and cultivate future leaders and volunteers long before you need them. Begin to train your successors now.

Section 6: CLSA Chapter Support

The CLSA Central Office will provide the local chapters guidance with the following support. Lists and reports may be requested at any time, most commonly monthly.

1. CLSA Central Office Resources

- 1) Membership lists showing the names, addresses, phone numbers and email addresses of potential members
- 2) Address labels for potential members
- 3) Assistance in conducting membership drives
- 4) Lists of contacts and leaders of other chapters
- 5) Chapter Handbook & resource material
- 6) Speakers Bureau Database
- 7) Newsletter Template
- 8) Assistance in promoting events
- 9) Guidance and tools to help in the management of the chapter

2. CLSA Website

The CLSA website is a great resource. Be sure to bookmark the CLSA website:
www.californiasurveyors.org

FIND A SURVEYOR - www.californiasurveyors.org/files/findasurv.php

Provides the public a means for locating a licensed land surveyor (CLSA Members only) in their area. Search by last name, city, zip code or license number. Provides CLSA Members complimentary advertising.

CLSA FORUM - www.californiasurveyors.org/clsforum

Provides a medium for exchange of information. Includes a discussion board, classifieds page and professional development forum.

CHANGE OF ADDRESS - www.californiasurveyors.org/files/changeaddr.html

To insure you continue to receive information from CLSA, be sure to notify CLSA if your contact information (including email address) changes.

MEMBERS ONLY WEBSITE - www.californiasurveyors.org/files/login.php

The CLSA Members Only section of the website includes useful information on legislation, selected statutes, AG and IBLA Opinions and more. A username and password is required to access this portion of the website. Your username is your last name and your password is your CLSA Member ID. This information can be found on your CLSA Membership Card.

EVENT CALENDAR - www.californiasurveyors.org/clsaforum/calendar.php

Visit the CLSA Event Calendar for information regarding conferences, seminars, board meetings etc.

Chapters should submit their events for posting to clsa@californiasurveyors.org . Please allow up to 2 weeks for posting.

PAY DUES ONLINE - <http://www.californiasurveyors.org/paydues.asp?sid=>

Enter your username and password to pay your CLSA member dues online. Your username is your last name and your password is your CLSA Member ID. This information can be found on your CLSA Membership Card.

JOIN ONLINE - <http://www.californiasurveyors.org/joinclsa.asp>

Joining CLSA has never been easier. Non-members can complete the CLSA membership application and pay dues online.

CLSA STORE - <http://www.californiasurveyors.org/publications.html>

Visit the CLSA Store to purchase publications. Enter your username and password to shop as a member and take advantage of member pricing. (Members save 50%)

FAVORITE FORMS - <http://www.californiasurveyors.org/favforms.html>

Here you will find useful forms for downloading.

CLSA CHAPTERS - <http://www.californiasurveyors.org/chapt.html>

Each Chapter has a page on the CLSA website which contains a list of Chapter Officers. To add information to your Chapter page (i.e. newsletters, flyers, meeting schedules), please email clsa@californiasurveyors.org Please allow up to 2 weeks for posting.

3. Important Dates

March 1st

Chapter Financial Statements Due

Financial forms will be emailed to each chapter treasurer and must be completed and returned no later than February 1st.

July 31st

Full Membership Roster Due

Email your list of chapter members to clsa@californiasurveyors.org The list will be used to qualify the number of Chapter Representatives for the following year. Each chapter is entitled to one representative per 20 (or fraction thereof) corporate members in good standing with both the chapter and the state.

September 30th

List of Chapter Officers and Representatives Due

Email your list of chapter officers and representatives to the CLSA Central Office. The list will be used to develop the CLSA Who's Who as well as order name badges for chapter representatives.

December 31st

Annual Report Due

Email your annual report to clsa@californiasurveyors.org. A PDF fill-in form is available for chapter use.