

LA CAMFT

# SPECIAL INTEREST GROUPS

*A USER GUIDE*

6/7/2014

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# Welcome!

Special Interest Groups (AKA: SIGs) continue to dynamically evolve as a part of our Los Angeles Chapter of CAMFT. SIGs provide our members a variety of leadership and collaboration opportunities, as well as offering a diverse range of learning opportunities for both our members and for the broader mental health community.

With this evolution has come a need to restructure and clarify SIG policy and operations within our volunteer organization. This User Guide aims to address these needs.

Consistent with our Chapter philosophy of evolutionary growth, this User Guide is presented as a living document open to periodical change as we grow and discover what works and what can use some improvements.

Therefore, feedback from our members eager to improve our organization and the role of SIGs is encouraged and welcomed. For this purpose a downloadable digital *SIG User Guide Suggestion Box* (See: *FORM: N*) can be found on our LA CAMFT website for any member to use. We want to hear from you!

## What is a SIG?

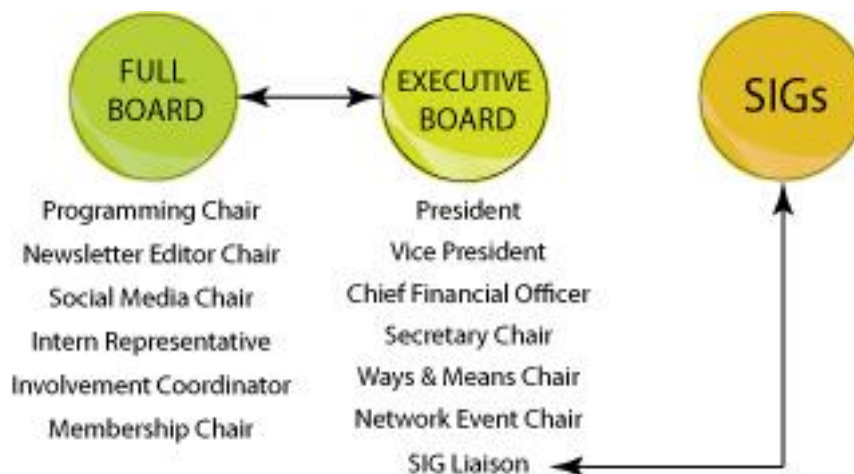
Special Interest Groups (AKA: SIGs) are small sub-groups within LA CAMFT conceived, created and led by LA CAMFT members around a specific topic or area of focus.

SIGs function under the auspices of LA CAMFT's Full Board (FB) and Executive Board (EB), who together share governance duties over the entire Chapter, as well as provide support and guidance to all Chapter sub-groups.

Board oversight ensures that SIGs function within the framework of LA CAMFT's protocols, policies, and procedures (AKA: the 3-Ps) and ensures that all Chapter activities comply with applicable CAMFT and BBS requirements, and State & Federal Tax laws.

A series of SIG **Forms & Guidelines** that codify the 3-Ps have been created to support both SIG and Board responsibilities for the different kinds of activities SIGs may undertake. These forms will be referenced throughout this manual and examples of each can be found in the appendix.

The following diagram illustrates how SIGs connect to the Chapter's organizational hierarchy.



The role of the SIG LIAISON (shown in the diagram above) has been created to:

- Guide those interested in obtaining Board approval to form a SIG
- Assist communications between SIGs and the Board as needed
- Support SIGs in navigating the Chapter's 3-Ps and utilization of all forms
- Be a resource for the general functioning of SIGs

## What structure must a SIG have?

As SIGs have evolved and increased the variety of activities they can undertake, the Board has recognized a need for SIGs to have two Co-Chair leaders, supported by a core-leadership team, which may fluctuate in response to specific needs or undertakings.

The Co-Chair requirement serves several Chapter values and Chapter goals:

- Teamwork
- Shared leadership responsibilities
- Chapter sustainability

**Regarding Sustainability:** SIGs are a part of LA CAMFT's brand and services. The presence of Co-Chairs is seen as a safeguard against service disruptions to our members during a SIG leadership succession. Succession is an expected evolutionary process needing teamwork and planning (see, *FORM:M SIG: Chair Leadership Succession*).

## What are the SIG Chair's responsibilities?

SIG Chairs are a vital part of the LA CAMFT leadership team. As leaders, SIG Chairs agree to uphold LA CAMFT values, mission statement, sustainability goals, and brand visibility. Therefore, SIG Chairs:

- Initiate and complete the steps for the SIG Creation process (*FORM: A & B*)
- Lead, manage, delegate, and oversee SIG internal affairs
- Assure SIGs are active, maintained, and open to all
- Ensure SIG sustainability through an orderly Chair succession plan (*FORM: M*)
- Ensure SIG compliance with the Chapter's 3-Ps
- Inform the Board of SIG plans, activities, challenges and concerns by:
  - Presentations at Full Board meetings
  - Communications with the SIG Liaison
  - Timely usage of all applicable forms, when required
  - Provide the Executive Board a monthly memo using *FORM: C SIG Chairs: Monthly Memo*

**Monthly Memos** are brief check-ins sent by the SIG Chairs to the Executive Board, for keeping the SIGs and the Board well connected and up-to-date. With so much activity happening within LA CAMFT advance planning and calendaring is a real necessity. These memos are an essential tool to support strategic planning for the whole organization.

- SIG Memos are due the **last week of each month**.
- SIG Memos are to be emailed to the Board Secretary, and cc'd to the SIG Liaison, who will place the memos content on the EB meeting agenda

## Who can create a SIG?

Only LA CAMFT Chapter members in good standing can submit a request to the Executive Board to create a new SIG (See: **FORM: A & B**). Ideally the request shall come from both SIG Co-chairs, though there is the option for an individual Chapter member to initiate the SIG Creation process before selecting a co-chair, but with the understanding that prior to the actual creation of the SIG they must partner with another Chapter member as co-leaders for their SIG.

## What are the steps for creating a SIG?

SIG creation is a multi-step process. The goal of this multi-step process is to create SIGs that are uniquely focused, viable, collaborative, and led by SIG Chairs who are well informed of LA CAMFT's protocols, policies, and procedures (AKA: the 3-Ps).

### **QUICK LOOK: 5 steps to create a SIG**

*(Note: For step 1 & 2 a member may start this process without a partner with the understanding that partnering with a co-chair is required for the subsequent steps.)*

- 1) SIG Chair/s work together to formulate an initial concept for a SIG. When ready, and having read this manual,
- 2) SIG Chair/s complete **FORM: A SIG Creation: Request**, and send it to the SIG Liaison who will have it placed on the agenda of the next Executive Board meeting for initial discussion. After the discussion,
- 3) SIG Chairs will be invited to submit a detailed **FORM: B SIG Creation: Proposal & Action Plan**, to the Executive Board for further review. At completion of the Executive Board review process,
- 4) SIG Chairs submit **FORM: B** to the Full Board for final review. After completion of this final review process,
- 5) The officially appointed SIG Chairs introduce their SIG at the next available LA CAMFT Networking Event, with an article in the next available *LA Therapist Update* newsletter, and create content for a SIG Website page to be placed on the LA CAMFT website.

*Note: During all steps of the SIG Creation processes, the SIG Liaison shall be available for support and guidance.*

## What activities can a SIG do?

SIGs are encouraged to be creative and explorative within their area of interest, and to act independently as a group. With these freedoms is also the responsibility to uphold the Chapter's 3-Ps, support the Chapter's brand, and keeps the Board informed of all its activities and plans.

Some things a SIG might consider doing are:

- Submit articles for the *LA Therapist Update* newsletter about the SIG's special focus
- Plan and create no-charge events such as social gatherings, consultation groups, or other kinds of member only hosted gatherings
- Plan and create events or workshops that require an attendance fee for members and non-members
- Offer CEUs for workshops
- Work with the Chapter Programming Chair to bring SIG relevant speakers of interest to the Chapter Networking Events
- Initiate SIG relevant community outreach for the Chapter
- Carry out specific Chapter support tasks that are in line with the SIGs focus, purpose and goals
- Collaborate with other SIGs

## What can't a SIG do?

While operating independently as a sub-group, SIGs may not operate as an autonomous or separate entity from LA CAMFT, nor act without LA CAMFT Board agreement and oversight.

- As such, SIGs may not hold events/workshops without Board agreement
- SIGs may not negotiate sponsorship agreements
- SIGs may not enter into any contractual arraignment, nor make promises to third parties on behalf of LA CAMFT
- SIGs may not incur expenses without CFO approval
- SIGs must utilize only Board approved marketing and advertising tools
- SIGs may not violate Chapter policies, protocols and procedures, or act without utilizing all applicable forms

## About SIG Events/Workshops

Events and workshops are often initiated with great enthusiasm (and perhaps some anxiousness, especially for first time producers) requiring SIG teamwork, planning and organization. No matter what level of prior experience a SIG has with producing events/workshops, the SIG Liaison and other Executive Board members are here for support and encouragement, and guidance as needed.

To facilitate event/workshop planning & execution the Board has created a series of **Forms & Guidelines** (see appendix) for creating, managing, financing and auditing SIG events/workshops. The forms & guidelines are:

- FORM: D SIG Event/Workshop: Proposal & Budget
- FORM: E SIG Event/Workshop: Post Report
- FORM: F SIG Event/Workshop: Marketing Guidelines
- FORM: G SIG Event/Workshop: Petty Cash Request
- FORM: H SIG Event/Workshop: At Door Payment Guidelines
- FORM: I SIG Event/Workshop: CEU Guidelines
- FORM: J SIG Event/Workshop: Sponsorship Guidelines
- FORM: K SIG Event/Workshop: Event Participant Refund
- FORM: L SIG Event/Workshop: Reimbursement

## Approval Steps to create a SIG Event/Workshop

### QUICK LOOK: 3 Required Steps For Approval

- 1) The SIG leadership team considers what kind of event/workshop to produce, and sets down an initial plan.
- 2) The SIG leadership team does an initial feasibility study of their plan.
- 3) The SIG Chairs then submit a formal plan using *FORM: D SIG Event/ Workshop: Proposal & Budget* to the EB for approval.

### Here are the 3 steps in full:

1. SIGs explore what kind of event/workshop they wish to create.

SIG events/workshops fall into two categories:

- **No participation fee.** Examples of these include peer support meetings and informal gatherings (an example is the current Supervision Discussion Group SIG). Note: “No Fee” events are not the same as “No Cost” events, as there is



always a cost to the Chapter for the Information Technology (IT) needed for email blasts, website announcements, online registration, and other kinds of charges such as food or other necessities.

- **Participation fee required.** SIG events which may include offering BBS CEUs. SIG events/workshops function as fund-raisers for the Chapter. Chapter policy is to make the participation fee affordable, while at minimum covering the costs of producing the event/workshop.

2. Members of the SIG explore the feasibility of an event/workshop by considering the following applicable punch-list of items:

- Event topic
- Scheduling
- Venue
- Speaker/Presenter
- Budget
- Sponsorship
- Continuing Education Units (CEUs)
- Marketing: Network Event announcements, Flyers, E-blasts, Website notice, Social Media, etc.

(Note: This is not a complete list of what is possible to consider; and each line item holds a range of considerations. The SIG Liaison and other EB members are here to help!)

3. SIG Chairs submit **FORM: D** to the SIG Liaison who will have it placed on the next monthly EB meeting for review.

## Money Matters for SIG Events/Workshops

When Chapter funds are needed to cover the costs of SIG activities, it is very important to follow the 3-Ps carefully. Take a deep breath. The following guide will walk you through the seemingly complex layers of Chapter finance.

**First**, recognize that LA CAMFT is a local Chapter of CAMFT, and operates as a 501.c6 non-profit corporation. This means that it must comply with State and Federal Tax laws governing such non-profits. To assure that LA CAMFT is in compliance with these laws, the Chapter has established the following Board positions and committees: Chapter Finance Committee with a Chief Financial Officer (CFO), Ways and Means Committee, and Chapter Administrator.

**Second**, recognize that all financial activities require adherence to standard bookkeeping protocols. These protocols require that financial records be kept for any LA-CAMFT sponsored event. SIG events are LA-CAMFT sponsored events and therefore require a Financial Report that includes all money transactions planned for and generated by the SIG activities. This is why Budget Reports are required. Additionally, the BBS requires

standard protocols for offering CEUs, which includes random audits to check for compliance.

**Third**, understand that it is the SIG Chair's responsibility to consult with and obtain prior approval from the Chapter's CFO or Administrator whenever Chapter monies exchange hands, and to manage money transactions in accordance with the Chapter's protocols.

**Fourth**, remember there are plenty of resources to guide you through the process! The CFO or SIG Liaison are available to assist you with your 'money matters' questions.

## Money Matters FAQs

Here are some additional questions or scenarios you may encounter as a SIG:

**1. Do SIG Event presenters receive payment?**

*No. Presenters are not paid and should not receive money from participants or SIG Chairs.*

**2. Can SIG Chairs tell presenters that LA CAMFT will cover the cost of event materials?**

*Yes. The SIG Chair may inform the speaker that preapproved costs will be reimbursed with submitted receipts. Preapproved costs are to be included in the event budget (**FORM: D**) prepared by the SIG Chair. However, sometimes material-costs are not known up front, and arise along the way or even on the day of an event. Therefore, SIG Chairs can receive petty cash (**FORM: G**) to obtain a petty cash advance from the Chapter's CFO for such circumstances. For proper accounting purposes, the CFO requires that original receipts for spent petty cash be returned with remaining petty cash to the CFO at the soonest possible time following the event. The original receipts and remaining cash must add up to the original petty cash amount allocated, and the SIG Chairs will be responsible for any discrepancy.*

**3. Will the Chapter reimburse SIG Chair for other expenses incurred for the SIG event such as venue fees, refreshments, or materials?**

*Yes. As with question #2, preapproved event expenses included in event budgets will be reimbursed to SIG Chairs with original receipts (See: **FORM: L**).*

**4. How is event registration handled?**

*Participants register for SIG events/workshops through the LA-CAMFT online registration system known as **FORMSTACK**.*

**5. Is there a cost for the **FORMSTACK** registration?**

*Yes. There is an IT cost of approximately \$250 for every event the Chapter sponsors. This cost must be factored into the SIG event's budget.*

**6. Who manages the online registration?**

*The SIG Chairs manage the registration list for SIG events. This process requires the SIG Chairs to become familiar with FORMSTACK, to track the number of people registered and the number of cancellations, and to create a registration and a wait list for their event from the FORMSTACK data spreadsheet. The SIG Liaison or Executive Board member will provide support.*

**7. Can participants register and pay for the event at the door?**

*Yes. As long as there is space available and the Maximum Room Occupancy according to fire regulations has not been reached, participants can register and pay at the door. SIG Chairs are responsible for collecting participant payments, maintaining a cash envelope, and handing over any 'at-door' income to the CFO after the event (See: **FORM: H**).*

**8. Can SIG Chairs obtain sponsors for workshops?**

*Yes. 'Actual' and 'In-kind' sponsorships can be obtained for SIG events. The most common is for a provider to allow the workshop to be held at their venue without charging LA CAMFT a fee to use their space. However, SIGs may not negotiate sponsorship terms, nor make promises to potential sponsors, as this is done by the Ways & Means Committee (See: **FORM: J**).*

**9. How is the size of an event determined?**

*First, the SIG asks the venue's owner or manager what the Maximum Occupancy load is as dictated by local fire & safety codes for the room under consideration. With the rooms Max. Occupancy load known, the SIG determines an ideal participant number to ensure the best experience for the participants according to what is being offered, while not exceeding the Max. Occupancy load of the room.*

**10. How are CEUs arranged for and managed?**

*It is the SIG Chairs responsibility to arrange for and manage the CEU process during the event (See: **FORM: I**).*

**11. How is advertising for an event handled?**

*LA CAMFT has several tools for letting its members know about events, and each tool is administered differently and has specific requirements & formatting guidelines (See: **FORM: F**).*

## Appendix

<i>FORM: A</i>	<i>SIG Creation: Request</i>	Page 12
<i>FORM: B</i>	<i>SIG Creation: Proposal &amp; Action Plan</i>	Page 13
<i>FORM: C</i>	<i>SIG Chairs: Monthly Memo</i>	Page 14
<i>FORM: D</i>	<i>SIG Event/Workshop: Proposal &amp; Budget</i>	Page 15
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<i>FORM: F</i>	<i>SIG Event/Workshop: Marketing Guidelines</i>	Page 17
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<i>FORM: L</i>	<i>SIG Event/Workshop: Reimbursement</i>	Page 28
<i>FORM: M</i>	<i>SIG: Chair Leadership Succession</i>	Page 29
<i>FORM: N</i>	<i>SIG User Guide: Suggestion Box</i>	Page 30

\*Please note that the example forms below are not live usable forms, and are here for reference purposes and to gain familiarity with them. Live usable forms can be downloaded from the LA CAMFT website under the SIG link.

**FORM: A**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG CREATION: REQUEST**

Please complete this digital form, and email it to the SIG UASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting.

**Today's Date:** click, then use arrow  
**Name of SIG:** enter SIG name  
**SIG Chair:** enter name  
**Phone:** enter phone  
**Email:** enter email  
**Check 'Yes' to confirm you've read the SIG User Guide:**  Yes

**SIG Chair:** enter name  
**Phone:** enter phone  
**Email:** enter email  
**Check 'Yes' to confirm you've read the SIG User Guide:**  Yes

***PLEASE DESCRIBE THE FOCUS OF YOUR SIG***

enter response, field will expand as needed

***PLEASE DESCRIBE YOUR VISION & GOALS FOR YOUR SIG***

enter response, field will expand as needed

***PLEASE DESCRIBE YOUR EXPERIENCE & TRAINING WITH THE SIG'S FOCUS (a resume is welcomed)***

enter response, field will expand as needed

***PLEASE DESCRIBE YOU LEADERSHIP EXPERIENCE & PHILOSOPHY (a resume is welcomed)***

enter response, field will expand as needed

***PLEASE DESCRIBE YOUR PLANS FOR DEVELOPING A SIG LEADERSHIP TEAM***

enter response, field will expand as needed

***PLEASE STATE THE SIG'S BENEFITS FOR LA CAMFT***

enter response, field will expand as needed

***DO YOU HAVE SPECIFIC ASSISTANCE REQUESTS FOR THE BOARD AT THIS TIME?***

enter response, field will expand as needed

**FORM: B**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG CREATION: PROPOSAL & ACTION PLAN**

Please complete this digital form, and email it to the SIG LIASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting.

<b>Today's Date:</b>	click, then use arrow	<b>For office use:</b>	<b>Approved:</b> click, then use arrow
<b>Name of SIG:</b>	enter SIG name		
<b>SIG Chair:</b>	enter name		
<b>Phone:</b>	enter phone		
<b>Email:</b>	enter email		
	<b>Check 'Yes' to confirm you've read the SIG User Guide:</b>	<input type="checkbox"/>	Yes
<b>SIG Chair:</b>	enter name		
<b>Phone:</b>	enter phone		
<b>Email:</b>	enter email		
	<b>Check 'Yes' to confirm you've read the SIG User Guide:</b>	<input type="checkbox"/>	Yes

***PLEASE STATE THE FOCUS OF YOUR SIG***

enter response, field will expand as needed

***ACTON PLAN (i.e. List tasks to be completed to implement SIG with estimated completion date)?***

enter response, field will expand as needed

***WHEN DO YOU ANTICIPATE ANNOUNCING YOUR LAUNCH DATE? (Please explain what you feel needs to be in place in order to announce your launch.)***

enter response, field will expand as needed

***WHAT PARTICIPATION AND/OR INITIAL SUPPORT DO YOU EXPECT TO NEED FROM LA-CAMFT LEADERSHIP TO LAUNCH?***

enter response, field will expand as needed

***DO YOU ANTICIPATE IMMEDIATE FINANCIAL NEEDS?***

enter response, field will expand as needed

***PLEASE USE ADDITIONAL SPACE TO ADD ANY COMMENTS YOU WISH TO INCLUDE, REQUESTS YOU WISH TO MAKE, OR IF YOU WISH TO OFFER FEEDBACK ON THE SIG CREATION PROCESS***

enter response, field will expand as needed



**FORM: C**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG CHAIRS: MONTHLY MEMO**

Please complete and email this form to the SIG LIASON ([danielfactor@me.com](mailto:danielfactor@me.com)) **the last week of each month** for placement on the agenda of the next Executive Board meeting.

**Today's Date:** click, then use arrow  
**Name of SIG:** enter SIG name  
**SIG Chair:** enter name  
**SIG Chair:** enter name

***Update: please include a summary of this month's activities or any new developments since last SIG Memo***

enter response, field will expand as needed

***Anything you need assistance with?***

enter response, field will expand as needed

From the desk of Daniel Factor  
04/14

**FORM: D**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
 P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: PROPOSAL & BUDGET**

Please complete this form, and email it to the SIG LIASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting.

Today's Date: click then use drop down arrow to select today's date  
 Name of SIG: enter SIG name  
 SIG Chair: enter name  
 SIG Chair: enter name  
 Date of Event: select date. Time (Start/End): enter start/end time  
 Name of Venue: enter venue name  
 Address of Venue: enter address  
 Venue Max. Occupancy: enter # Est. # of Attendees: enter #

**EVENT INFORMATION**

Event Title: enter title  
 Event Topic: enter topic  
 Name of Presenter: enter name  
 Presenter's Resume attached?  Yes  No  
 Will CEUs be offered?  Yes  No How many units: enter #  
 (NOTE: For CEUs, please use **FORM: I**)

**FINANCIAL INFORMATION****Projected Expenses**

Cost of venue:	\$ amount	(Free? Hourly charge?)
Copying of handouts:	\$ amount	(Base estimate on max attendance)
Other supplies:	\$ amount	(Not all events have this)
Snacks/Beverages/Water	\$ amount	(Not all events have this)
LACAMFT IT support (eblasts, etc.)	\$ amount	(Board will help you estimate this)
Other Advertising/Promotion	\$ amount	(Board will help you estimate this)
Gift for presenter:	\$ amount	(Board will help you estimate this)
Other:	\$ amount	
Projected Expenses TOTAL		\$ total

**Projected Income**

Participant Fee:	\$ amount	Times Estimated # of attendees =	Enter #	\$ amount
Other income?	please specify			\$ amount
Sponsored Amount: (NOTE: For Sponsorship please refer to <b>FORM: J</b> )				\$ amount
Projected NET Income after deducting Expenses TOTAL				\$ total

From the desk of Daniel Factor  
 04/14



**FORM: E**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: POST EVENT REPORT**

Please complete this form, and email it to the SIG LIASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting, and all other forms noted below as directed on each form.

Today's Date: click, then use arrow  
Name of SIG: enter SIG name  
SIG Chair: enter name  
SIG Chair: enter name  
Event/Workshop Title: enter name  
Date of Event: select date      Time (Start/End): enter start/end time  
Name of Venue: enter venue name  
Number of Attendees: enter #      Pre-registered: enter #      Walk-ins: enter #

Total Participant Revenue Received: \$amount  
Participant Revenue owed?  Yes       No      Revenue owed: \$amount  
If yes, please explain: enter response, field will expand as needed

Participant Refunds requested:  Yes       No      (Please use **FORM: K**)

CEUs Offered?  Yes       No      (Please use **FORM: I**)  
CEU paperwork collected?  Yes       No  
CEUs Delivered?  Yes       No

Expenses to reimbursement?  Yes       No      (Please use **FORM: L**)

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***SIG Chair/s impression of event: Lessoned Learned?***

enter response, field will expand as needed

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***Summary of participant evaluations***

enter response, field will expand as needed

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***Anything you need assistance with?***

enter response, field will expand as needed

**FORM: F**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

### **SIG EVENT/WORKSHOP: SIG MARKETING GUIDLINES**

#### **LA-CAMFT Approved Marketing tools**

- **E-blasts**
- **Newsletters**
- **Network Event literature table**
- **Social Media content**
- **Website**

#### **Deadlines for submitting marketing/advertising items are:**

- **E-blast:**
- **Newsletter:**
- **Network Literature Table:**
- **Social Media content:**
- **Website:**

#### **Submit to (by email: cc'd to SIG Liaison; or paper copies directly to):**

- **E-blast:**
- **Newsletter:**
- **Network Literature Table:**
- **Social Media content:**
- **Website:**

From the desk of Daniel Factor  
04/14

**FORM: G**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: PETTY CASH REQUEST  
INSTRUCTION SHEET**

*These instructions apply to the attached FORM, which has been created with FIELDS for you to enter your information.*

*Please read the following:*

- *With Board approval Petty Cash may be advanced to Chapter leaders in good standing by the Finance Committee for the purpose of purchasing miscellaneous items needed for pre-approved LA-CAMFT events/workshops and meetings.*
- *Use of Petty Cash is not intended for the purchase or rental of items that can be paid for prior to or after an event by regular means, i.e., use of LA-CAMFT check or LA-CAMFT credit card.*
- *The leader requesting the Petty Cash advance is ultimately responsible for managing and accounting for all monies advanced. The leader will be provided a Petty Cash Envelope for this purpose.*
- *The LA-CAMFT CFO will assist by answering any question about Petty Cash & Envelope management.*

**To request Petty Cash & Envelope**

1. *Please fill out all the fields on the form below, and email to:*

*CFO: Maria Dylan*

*Email: [mariadylan@dreamstudies.net](mailto:mariadylan@dreamstudies.net)*

*Phone: (310) 967-7958*

2. *Then coordinate with the CFO, or their representative, a time to pick up the Petty Cash.*

3. *When receiving the requested Petty Cash & Envelope from the CFO the Chair will confirm the content of the petty cash envelope and sign & date a Petty Cash Release receipt.*

(Continued)

**FORM: G**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: PETTY CASH REQUEST FORM**

Please complete this form, and email it to the CFO Maria Dylan ([mariadylan@dreamstudies.net](mailto:mariadylan@dreamstudies.net))

<b>Today's Date:</b>	select today's date	
<b>Name of SIG:</b>	enter SIG name	
<b>SIG Chair:</b>	enter name	
<b>SIG Chair:</b>	enter name	
<b>Petty Cash Is For:</b>	select from list	<b>If 'Other', specify:</b> enter here
<b>Title of Offering:</b>	enter name	
<b>Date of Offering:</b>	select date	<b>Time (Start/End):</b> enter start/end Time
<b>Name of Venue:</b>	enter venue name	
<b>Address of Venue:</b>	enter address	
<b>Amount Requested:</b>	\$enter #	<b>Date Needed By:</b> select date

The member/s whose name is entered above agrees,

- To take full responsibility for the Petty Cash & Envelope they received;
- To manage the Petty Cash & Envelope and to obtain and keep all original receipts for all expenditures;
- That the sum of the receipts and unused petty cash returned shall add up to the amount originally advanced, and that any discrepancy will be the responsibility of the signee for the petty cash.

The SIG Chair whose name is entered above when receiving the Petty Cash & Envelope from the CFO, or representative, shall confirm the content of the Petty Cash envelope and sign & date a *Petty Cash Release* receipt provide at time of delivery.

From the desk of Daniel Factor  
04/14



**SIG EVENT/WORKSHOP: AT-DOOR PAYMENT  
INSTRUCTION SHEET**

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**PLEASE PRINT AND USE 'AT-DOOR PAYMENT' FORM ON PAGE 2**

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LA-CAMFT welcomes those wanting to attend an event/workshop but who arrive on the day without pre-registering. SIG Chairs have the discretion to take walk-in participants. The primary consideration for allowing walk-in participation is to ensure not to exceed the venue's maximum occupancy limit established by fire-safety regulations.

It is incumbent upon the SIG Chair/s to be prepared for walk-in participants and to include along with a regular pre-registered arrival check-in process, an at-door payments process.

Based on experience:

- *Walk-ins might arrive prior to all pre-registered arrivals. Therefore, please consider the following:*
  - *If the online registration process has not exceeded the room occupancy or desired number of attendees, then walk-ins are welcome to pay at the door up to the occupancy limit of the room.*
  - *If the online registration process has sold-out, based on the room occupancy limit or based on reaching the SIG's desired number of attendees, then a waitlist for walk-ins may be started, recognizing that pre-registered attendees may arrive late and only after all seats have been filled by wait-listed arrivals. Therefore, thoughtful management is required.*
- *SIG Chairs are responsible for managing at-door payments and guaranteeing delivery of at-door payments to the CFO.*
  - *The attached form has been created to manage this process.*
  - *Please print and have available a set of these forms for the check-in team in anticipation of at-door payments.*
- *One the day of the event/workshop the CFO (or representative) will arrive at the venue and provide cash for change to the SIG check-in team, in an envelope which must be used to hold and record walk-in payments.*

(Continued)

**FORM: H**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**AT-DOOR PAYMENT FORM**

PLEASE LEGIBLY COMPLETE THIS FORM BY HAND, AND INCLUDE ALL SIGNATURES WHERE ASKED FOR

Date of Event \_\_\_\_\_  
Name of SIG \_\_\_\_\_  
Event \_\_\_\_\_  
SIG Chair/s \_\_\_\_\_  
Name of Venue \_\_\_\_\_  
Address of Venue \_\_\_\_\_  
  
Participant Name \_\_\_\_\_  
Participant Address \_\_\_\_\_  
Phone Number \_\_\_\_\_  
Email \_\_\_\_\_  
LA-CAMFT Member?  Yes  No

**METHOD OF PAYMENT**

CASH \$ \_\_\_\_\_  
CHECK \$ \_\_\_\_\_ CHECK # \_\_\_\_\_  
Name on check \_\_\_\_\_  
Address on check \_\_\_\_\_  
CREDIT/DEBIT \$ \_\_\_\_\_ CARD # \_\_\_\_\_  
Name on card \_\_\_\_\_  
Expiration Date \_\_\_\_\_ Security Code \_\_\_\_\_  
Card holder Signature \_\_\_\_\_

Signature of SIG member receiving payment \_\_\_\_\_

Office use only: Check/Card Payment Cleared: \_\_\_\_\_ Date: \_\_\_\_\_

**FORM: I**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: CEU GUIDELINES AND PROCEDURES**

Please read the following GUIDELINES and PROCEDURES and use the provided CEU DOCUMENTATION label

**GUIDELINES**

The California Board of Behavior Sciences (BBS) has specific requirements that CEU providers must meet if CEUs are being offered, and the BBS holds the right to audit CEU providers for compliance with their requirements. CEUs are documents tied to licensure, and therefore must be administered properly.

**STEPS TO RECEIVE LA-CAMFT BOARD APPROVAL TO PROVIDE CEUs**

In order to comply with BBS CEU requirements, LA-CAMFT SIGs must:

1. Notify the LA-CAMFT Executive Board of the wish to offer CEUs using **FORM D: SIG Event/Workshop: Proposal & Budget**
2. Receive approval from the LA-CAMFT Executive Board to offer CEUs.

A section of the BBS rules instructing what is required has been duplicated here

- *Syllabi for all courses;*
- *The time & location of all courses;*
- *Course advertisements;*
- *Instructor's vitaes/resumes;*
- *Attendance rosters with the names & license numbers of licensees who attended the course;*
- *Sign-in sheets;*
- *Records of course completion issued to licensees who attended the course.*

*Providers are required to submit the above records to the Board only when they are audited. Providers will be audited on a random basis to ensure compliance with Board criteria.*

**PROCEDURE TO PRODUCE CEUs DOCUMENTS**

CEU documents follow templates created by LA-CAMFT. A SIG Chair is responsible for contacting in a timely manner (at minimum two weeks prior to the event/workshop) the *SIG Liaison* for guidance on setting up and receiving the documents.

(Continued)



**FORM: I**

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**GUIDELINES ON THE DAY OF THE EVENT/WORKSHOP FOR MANAGING CEUs**

To ensure all documents are collected according to BBS requirements, LA-CAMFT suggests the following stipulations and guidelines:

1. To ensure CUEs are valid, a participant must fill out, sign and return an evaluation sheet.
2. At check-in, each participant is handed an evaluation form with the instruction that CUEs will be handed out at the end when they return their completed and signed evaluation sheet.

For auditing the check-in process, the SIG check-in team just prior to the day of an event/workshop may download a final pre-registration spreadsheet from the online registration software, and create a check-in list by reformatting the downloaded data onto a new spreadsheet, which includes a check box to denote a wish to receive CEUs, along with boxes for the participant's Sign in / Sign out signature (or initials).

Example of a SIG event/workshop participant check-in sheet (not to scale):

LA-CAMFT: SOMATIC EXPERIENCING EVENT NOVEMBER 3, 2013									
Last Name	First Name	Phone	Email	Arrived	Status	Email?	CEU	Sign in	Sign out
Doe	Jane	323-555-2121	jane@gmail.com		paid				
Smith	John	310-555-1212	john@gmail.com		comp				

**PROCEDURE TO ORGANIZE COLLECTED CEUs & REQUIRED PAPERWORK**

To assist SIG Chairs/s in organizing the required CEU BBS paperwork that must be maintained by LA-CAMFT for 4 years, SIGs Chair/s must do the following:

1. Obtain 8.5 x 11 envelope(s) for holding all completed and collected CEU documents;
2. Adhere to the face of each envelope the CUE DOCUMENTATION label (provided below);
3. Fill out and sign the adhered CUE DOCUMENTATION label, checking off each bullet item to acknowledge all documents have been placed in the envelope(s) and accounted for;
4. Hand the envelope(s) to an Executive Board member present at the event/workshop. If no E.B. member is present make delivery arrangements with *Maria Dylan* as soon as feasible.

(Continued)



**FORM: I**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
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CUE DOCUMENTATION envelope label:

**CALIFORNIA ASSOCIATION OF MARRIAGE & FAMILY  
THERAPISTS, LOS ANGELES CHAPTER**  
**CEU DOCUMENTATION**

Date(s) or workshop/event: \_\_\_\_\_  
Name of workshop/event: \_\_\_\_\_

---

Location of workshop/event: \_\_\_\_\_

---

- Program
- Sign-In/Sign-Out sheets
- Resume of instructor
- Syllabi for course/description of event
- Attendance Roster w/lic. numbers
- Copies of advertising
- Copy of the CEU document (a blank)

Documents reviewed by: \_\_\_\_\_

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**SIG EVENT/WORKSHOP: SPONSORSHIP GUIDELINES AND PROCEDURES****GUIDELINES**

Sponsorship is a means for the Chapter to cover the costs of producing an event/workshop, as well as a means of offsetting general Chapter operational expenses.

Sponsors are offered several kinds of benefits for making financial contributions, such as:

- Placement of sponsor literature on a literature table or within participant folders, when applicable.
- Brief speaking opportunities to introduce their specific services at the beginning of the event/workshop.
- Placement of an ad in LA THERAPIST UPDATE newsletter.
- And other creative opportunities, which can be negotiated between the Sponsor and the Executive Board.

Sponsorship arrangements fall under the aegis of the **Ways and Means Committee**, which is a standing committee within LA-CAMFT's Executive Board.

SIG Chair/s may not negotiate nor offer benefits directly to Sponsors without direct involvement and agreement of the **Ways and Means Committee**.

A SIG may already have an idea for a sponsor or may request help in finding a sponsor. The Sponsorship sub-committee of the **Ways and Means Committee** can assist the SIG in handling the sponsorship process.

**PROCEDURE**

Contact the current *Ways and Means Committee* Chair:

Maria Dylan

[mariadylan@dreamstudies.net](mailto:mariadylan@dreamstudies.net)

(310) 967-7958

**FORM: K**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG EVENT/WORKSHOP: PARTICANT REFUND  
INSTRUCTION SHEET & REQUEST FORM**

Please read the following GUIDELINES and PROCEDURES for completing a participant refund process

Occasionally a person after registering and paying for a SIG event/workshop has sufficient reason to request and receive a refund of payment.

The SIG Chairs/s have the discretion to decide if a refund request is appropriate and to advise the CFO and Administrator as to their decision.

**GUIDELINES**

- Requests for refunds ordinarily should be made before the event except in extenuating circumstances.
- LA-CAMFT wants to have a reasonable policy when it comes to refunds and has a goal of only denying refunds if it is an abuse of the system or the request is not made in a timely fashion.

**PROCEDURE**

When a SIG Chair/s determines a refund is within the guidelines noted above, they may do the following:

1. Fill out a *Participant Refund Request* (see attached) and email it to the LA-CAMFT Administrator and the Treasurer.
2. The Administrator or CFO will process the refund request and do one of the following:
  - a. If payment was made by credit card, a credit card refund will be issued
  - b. If payment was made by check, the check will be returned to the payee on the check, or if the check was deposited, an LA CAMFT check will be issued.

If the SIG Chair or the registrant has a question about a specific refund, contact the Administration or CFO for discussion.

As of the publication of this manual the Chief Financial Officer and Administer are as follows:

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*CFO: Maria Dylan*  
*Email: [mariadylan@dreamstudies.net](mailto:mariadylan@dreamstudies.net)*  
*Phone: (310) 498-4477*

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*Administrator: Christina Bielfelt*  
*Email: [Christina@lacamft.org](mailto:Christina@lacamft.org)*  
*Phone: (323) 964-3200*

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(Continued)

**EVENT PARTICANT REFUND REQUEST**

please fill out this refund request form and email to the *CFO* and *Administrator* noted below

**Today's Date:** click then use drop down arrow to select today's date  
**SIG Chair:** enter name  
**Phone:** enter #

**Event/Workshop Title:** enter title  
**Event/Workshop Date:** select date  
**Venue Address:** enter venue address

**Participant's Name:** enter name  
**Address:** enter address  
**Phone:** enter #  
**Email:** enter email  
**Date of Registration:** select date  
**Amount to be refunded:** enter amount  
**Method of original payment:** select method

As of the publication of this manual the Chief Financial Officer (CFO) and Administrator are:

**CFO:** *Maria Dylan*  
**Email:** [mariadylan@dreamstudies.net](mailto:mariadylan@dreamstudies.net)  
**Phone:** (310) 498-4477

**Administrator:** *Christina Bielfelt*  
**Email:** [Christina@lacamft.org](mailto:Christina@lacamft.org)  
**Phone:** (323) 964-3200

**Office use only:**  
Refund approved by \_\_\_\_\_

**Amount refunded:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Delivery method:** \_\_\_\_\_





**FORM: M**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
P.O. Box 480119, Los Angeles, CA 90048 T 323.964.3200

**SIG: CHAIR LEADERSHIP SUCCESSION**

Please complete this digital form, and email it to the SIG UASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting.

<b>Today's Date:</b>	click, then use arrow	
<b>Name of SIG:</b>	enter SIG name	
<b>SIG Chair:</b>	enter name	<b>Stepping down?</b> <input type="checkbox"/> Yes
<b>Phone:</b>	enter phone	
<b>Email:</b>	enter email	
<b>SIG Chair:</b>	enter name	<b>Stepping down?</b> <input type="checkbox"/> Yes
<b>Phone:</b>	enter phone	
<b>Email:</b>	enter email	

**BY WHAT DATE DO YOU PLAN TO STEP DOWN?**

enter response, field will expand as needed

**DO YOU HAVE A RECOMMENDATION FOR A NEW SIG CHAIR(S)?**

enter response, field will expand as needed

**WHO ARE REMAINING AS PART OF THE CORE LEADERSHIP TEAM?**

enter response, field will expand as needed

**WHAT PROCESS DO YOU HAVE FOR HANDING OFF YOUR CHAIR DUTIES & WISDOM?**

enter response, field will expand as needed

**PLEASE LET US KNOW THE REASON FOR STEPPING DOWN**

enter response, field will expand as needed

**FORM: M**

The California Association of Marriage & Family Therapists Los Angeles Chapter  
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**SIG & SIG USER GUIDE: SUGGESTION BOX**

Periodically the Board reviews what is working and what needs improvement, and when appropriate places suggested policy changes on the agenda of Board meetings for a consensus vote.

For this purpose, it is with gratitude that the Leadership welcomes your suggestions & feedback for improving this Manual and/or the procedures it describes, or more broadly the role of SIGs within our organization.

Please know that while what you offer here may not become policy, it will be seriously considered; and at minimum will begin a dialogue aimed at collectively improving our organization.

Please use this form, and email it to the SIG LIASON ([danielfactor@me.com](mailto:danielfactor@me.com)) for placement on the agenda of the next available Executive Board meeting. **Note:** to remain anonymous, you may fill in form, print and send by snail mail to the above address.

**Today's Date:** click, then use arrow      **For office use:**      **Reviewed:** click, then use arrow

**Name:** Name, or leave blank if you wish to remain anonymous

**Phone:** enter phone, or leave blank if you wish to remain anonymous

**Email:** enter email, or leave blank if you wish to remain anonymous

**Manual: Chapter Heading or Page Number**  
enter response, field will expand as needed

**Feedback, Suggestions or Comments**  
enter response, field will expand as needed

**SIGs: General Feedback, Suggestions, Comments or Desires**  
enter response, field will expand as needed

**Other items**  
enter response, field will expand as needed

From the desk of Daniel Factor  
04/14