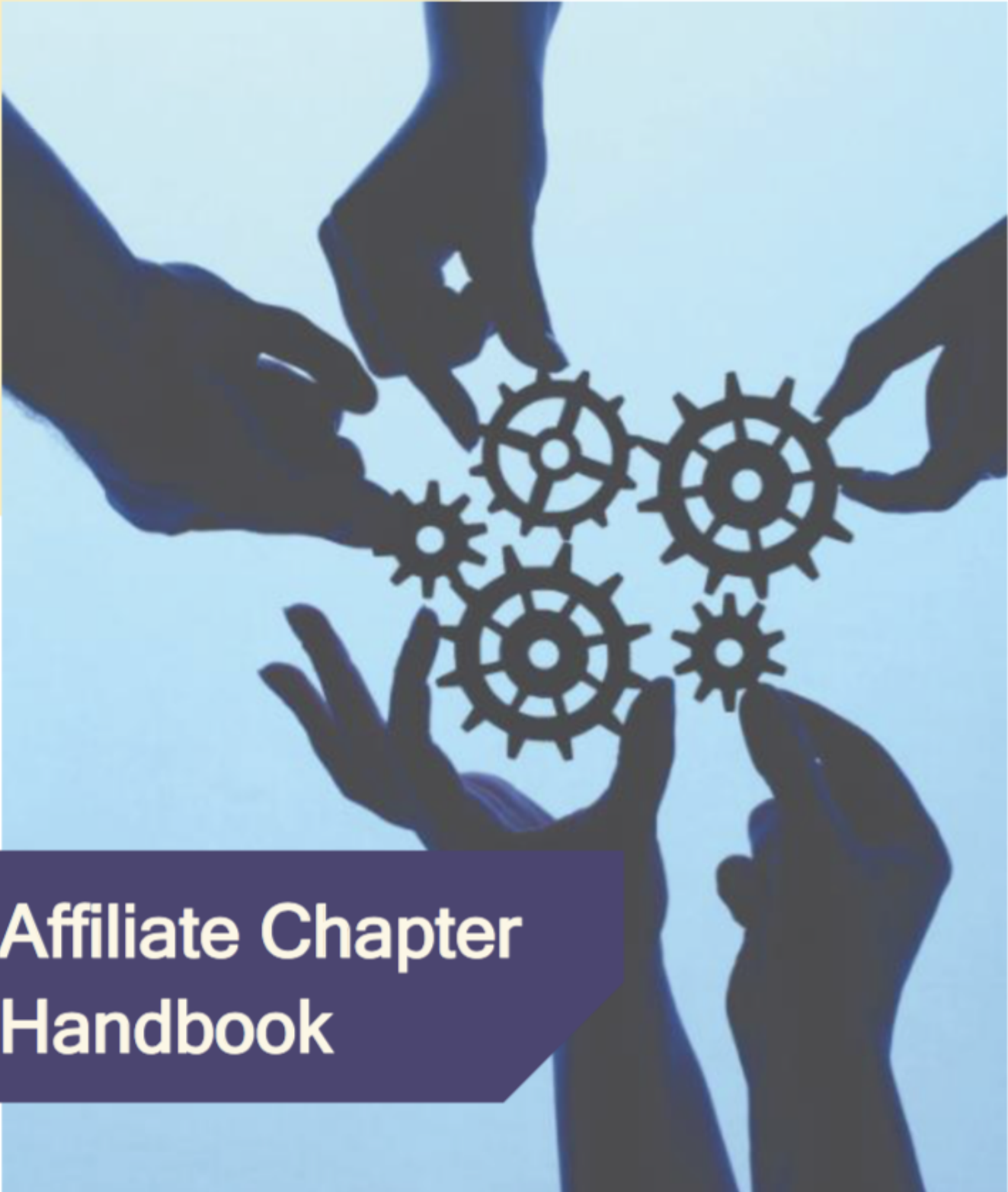


A graphic showing several hands in silhouette, reaching up to hold and interlock a series of black gears of different sizes. The background is a light blue gradient. A yellow rectangular bar is in the top left corner.

Affiliate Chapter Handbook

RID Registry of Interpreters for the Deaf, Inc.

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EDITOR'S NOTE

The Affiliate Chapter Handbook assists affiliate chapters in developing and maintaining a functional chapter of the Registry of Interpreters for the Deaf, Inc. This handbook is intended to be a “living document” with updates, additions and/or deletions made as needed and in a timely manner.

With each edition, the AC Handbook has grown and adapted to meet the diverse needs of the affiliate chapters. Not every section may apply to all affiliate chapters. Suggestions and inquiries regarding the Affiliate Chapter Handbook may be sent to the Director of Member Services, RID Headquarters at membership@rid.org.

RID would like to express its sincere appreciation to the following individuals and organizations for their assistance with the ongoing development of the Affiliate Chapter Handbook:

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REGISTRY OF INTERPRETERS FOR THE DEAF

History

The history of an organization becomes the foundation for that organization's future. On June 16, 1964, a group of interpreters, CODAs, Deaf and Hard of Hearing individuals and family members, and hearing professionals came together for a workshop on interpreting for the Deaf held at Ball State Teachers College (now Ball State University) in Muncie, Indiana. During that weekend, participants proposed the idea for a national registry of interpreters. The group founded what is now known as the Registry of Interpreters for the Deaf (RID). During the next eight years, the group was busy establishing a board, bylaws, a code of ethics, and publishing *Interpreting for Deaf People*, a manual and curriculum for training interpreters.

The 1970's brought about more growth and change. This growth was reflected in the establishment of a home office – first in the National Association of the Deaf's (NAD) Halex House and then on the campus of Gallaudet University. A key concern for the organization was quality assurance in interpreting. Out of that concern, with the assistance of the Texas and California affiliate organizations, rose a National Evaluation System commonly called certification, implemented in 1972. Several years later, specialty certifications for legal work and performance arts were developed. Early attempts were made to establish certification maintenance programs as well as grievance procedures. However, none of these early attempts were successful and the concepts were ultimately put on hold.

The period from 1980-1989 was a decade of assertiveness throughout the nation. People pushed for what they wanted, and RID membership was no exception. Thus, members saw a change in how the organization conducted business. Rather than following a top-down model, RID became a membership driven organization. To meet the growing needs of members, RID established five regions across the United States along with regional representative positions on the board. A new code of ethics was developed and RID was awarded the FIPSE grant to create a psychometrically sound certification. Certification

changed into a National Testing System and the Certificate of Interpretation (CI) and Certificate of Transliteration (CT) were born. As more affiliate chapters were founded, dual membership became the standard, stipulating that vote privileges required membership in both an affiliate chapter and the national organization.

The organization experienced another tremendous growth and development from 1990-2003. The Certification Maintenance Program (CMP) was established with the passing of the first unanimous vote in RID's history. RID joined with the National Association of the Deaf (NAD) to establish a task force, the National Council on Interpreting (NAD-RID NCI), to address common interests. This task force later expanded to include the American Sign Language Teachers Association (ASLTA) and the Conference of Interpreter Trainers (CIT).

By the year 2000, RID was administering more than 1,000 certification exams annually. RID purchased an office building in Alexandria, VA, in March 2001, increasing the organization's assets by becoming owners instead of renters. One year later, RID hosted the very first World Symposium on Sign Language Interpreting and by 2003, membership grew threefold, jumping from 3,000 to 10,000.

In 2003, NAD and RID signed a Memorandum of Understanding, merging NAD certification under RID's CMP and EPS systems. New specialty exams were available including the Oral Transliteration Certificate (OTC) and Certified Deaf Interpreter (CDI). An Ethical Practice System (EPS) was developed to increase quality assurance and the Code of Ethics was translated into Spanish. A grant funded mentoring program initiated outreach to minorities and rural populations. NAD and RID created the NAD-RID Code of Professional Conduct, implemented in 2005.

At the same time, a new national generalist exam was under development, courtesy of funds awarded by the state of Arizona. The new National Interpreter Certification (NIC) launched in 2005. In 2007, RID accepted an EIPA score of 4.0 or above as a qualifying score to receive the newly offered Ed:K-12 certification. Soon after, in 2009, RID members passed a motion changing the education requirement for the performance exam, expecting hearing

candidates to have a minimum of an associate's degree or an approved Alternative Pathway. Two years later, the requirement would change again, this time requiring a bachelor's degree or equivalent for hearing candidates and an associate's degree or equivalent for Deaf candidates wanting to take the CDI performance exam. In 2011, the Enhanced NIC Interview and Performance Exam launched.

The next five years would bring a time of assessment and organizational changes. Constant personnel changes within the organization, a deficit-spending approach to finances, and the inefficiency of the certification triad (certifications, Certification Maintenance Program, and the Ethical Practices System) led to deep instability within the organization and growing unrest by the members. In 2013, to focus the actions of volunteer leadership, the RID Board of Directors adopted the values of Roots, Respect, Relevance, and Results (The 4 R's) as guiding principles. Based on these values, a series of difficult decisions followed.

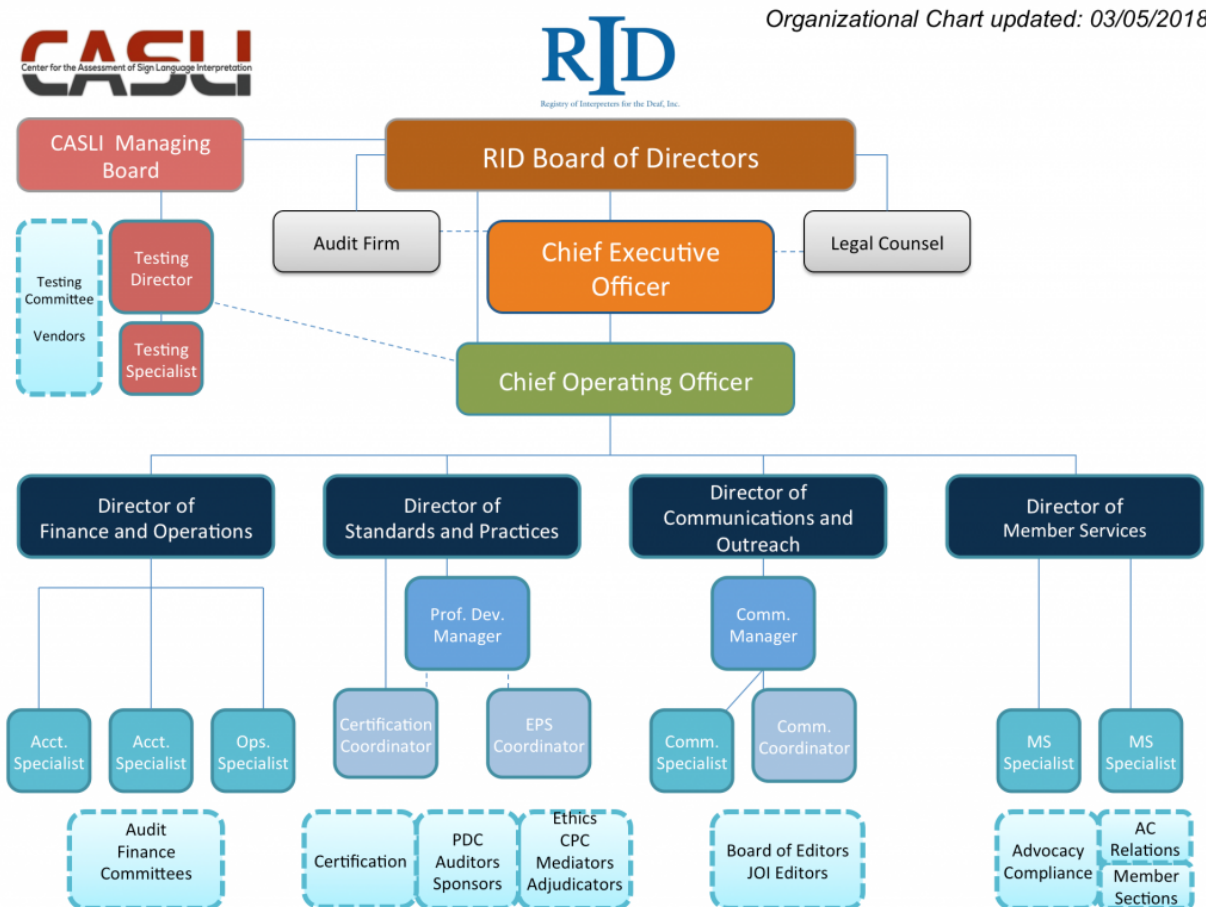
In 2014, the RID board hired an organizational consultant to identify systemic issues plaguing RID and to gain expert guidance and counsel on moving the organization through mounting challenges. A national survey sent to all RID members identified the testing system as the number one concern. In July 2015, the RID Certification Committee recommended the cessation of the CDI and SC:L exams and the sunseting of OTC, due to the long expired life-cycle of these exams and the concern that the exams were no longer legally or ethically defensible. The board agreed to place all performance exams into moratorium, the second moratorium in RID's history (the first occurring prior to the release of the CI/CT certifications). A few months later, the SC:L and OTC Knowledge Exams were put under moratorium as well. During this time, the organization, governance, testing, and certification underwent an intensive analysis by the external organizational consultant.

Upon verifying the validity and reliability of NIC, RID lifted the moratorium on NIC and devised a work group for a CDI provisional credential. In 2015, RID announced its plan to separate testing from RID by establishing an LCC, protecting RID from potential lawsuits and ensuring the neutrality of the test. In June of 2016, the Center for the Assessment of Sign Language Interpretation (CASLI) was officially established in Virginia. CASLI was tasked with

developing a new NIC and CDI performance exam while RID continued its role as the national certifying body.

Further organizational changes occurred in 2015 when RID veered away from deficit spending and committed to a zero-based budget. The immediate impacts were felt, influencing the moratorium, affecting hiring at headquarters, limiting board travel, and downsizing the 2017 national conference. A couple of years later, the role of the executive director split into two separate positions, CEO and COO, strengthening operations at the national office. Using data from member feedback and organizational needs assessments, RID developed a strategic plan focusing on organizational effectiveness, a functional certification system, exceptional member experience, the promotion of the profession, and fiscal sustainability.

Organizational Chart



Mission and Vision

RID plays a leading role in establishing a national standard of quality for interpreters and transliterators. RID encourages the growth of the profession, educates the public about the vital role of interpreters and transliterators, and works to ensure equal opportunity and access for all individuals.

Mission – What We Do

The Registry of Interpreters for the Deaf strives to advocate for best practices in interpreting, professional development for practitioners and for the highest standards in the provision of interpreting services for diverse users of languages that are signed or spoken.

Vision – Our Desired Future

By honoring its past and innovating for the future, RID envisions a world where:

- Its members recognize and support the linguistic rights of all Deaf people as human rights, equal to those of users of spoken languages;
- Deaf people and their values are vital to and visible in every aspect of RID;
- Interpreted interaction between individuals who use signed and spoken languages are as viable as direct communication;
- The interpreting profession is formally recognized and is advanced by rigorous professional development, standards of conduct, and credentials.

Board of Directors

RID's Board of Directors is a member-elected body of RID certified, professional interpreters that volunteer their time towards setting the direction and vision of the organization. The Board works closely with many stakeholders, both internally and externally, as well as with individual members as they move RID forward.

The RID Board of Directors consists of an Executive Board, which includes the President, Vice President, Secretary, Treasurer, Member-at-Large (MAL) and Deaf Member-at-Large

(DMAL), as well as Region Representatives, one for each of the five regions. All board members are nominated by RID members and elected in the spring for a two-year term. The officers, the MAL, and the DMAL are elected during national conference years, and the regional representatives are elected during alternative years. The immediate past president can serve as an ex-officio member of the board.

Headquarters

The national office of RID, located in Alexandria, VA, conducts the day-to-day business of the organization. Under the guidance of the Chief Executive Officer and Chief Operating Officer, Headquarters' staff take on the operational aspects of RID such as implementing strategic plans and membership decisions. Headquarters is also responsible for government affairs, public relations, posting of announcements and VIEWS, membership services, Certification Maintenance Program (CMP), Ethical Practices System (EPS), and much more.

Committees, Councils, and Task Forces

The RID volunteer leadership structure is composed of the board of directors, committees, councils, and task forces which accomplish specific tasks as assigned by the Board, often the result of motions passed by the membership. While committee members may work directly with individual RID members and affiliate chapter leadership, they do not govern chapter business or activities. They report to the board of directors and focus on national level projects and tasks. The RID president selects these volunteer leaders based upon an application process and recommendations from members. Volunteers are appointed after the biennial national conference and serve until the conclusion of the next national conference.

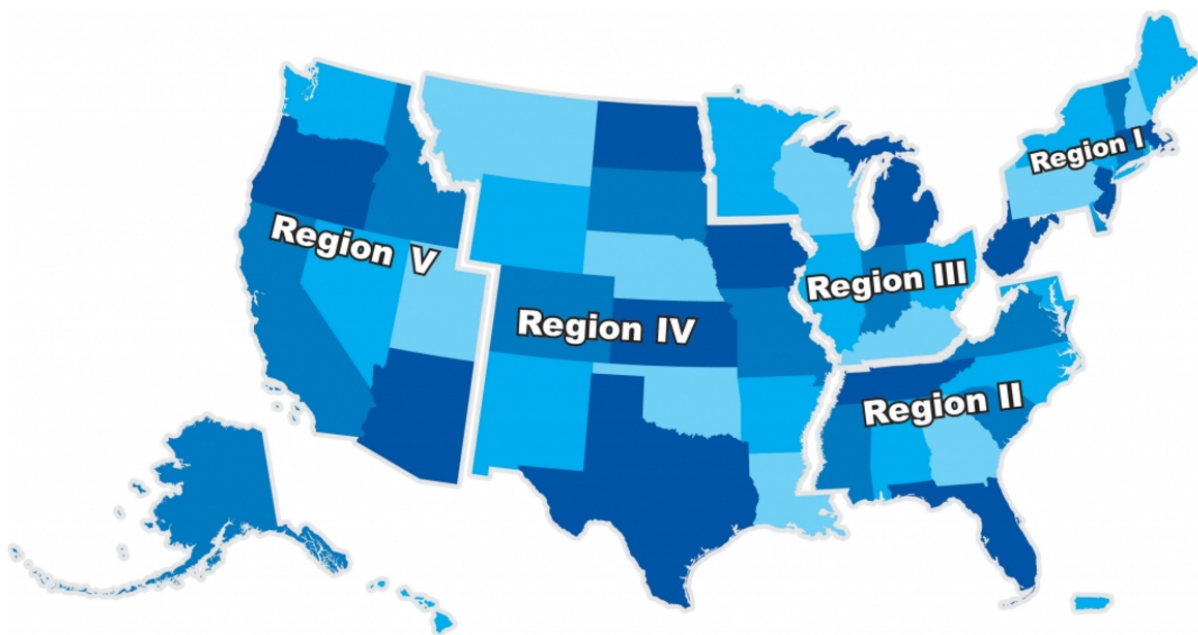
While committees, councils, and task forces are all volunteer groups working at the national level, there are some differences between the three. **Committees** tend to be organized around a specific issue or responsibility, such as the Audit Committee or the Ethics

Committee. **Councils** are composed of like individuals. The Council of Elders, for example, is made up of individuals who have many years of experience in the interpreting profession. **Task Forces** have specific goals, and may be disbanded when those goals are met, such as the various Standard Practice Paper Task Forces.

Region Representatives

RID has five region representatives to ensure representation on the board of directors from across the United States. Each region elects one region representative who volunteers to serve a two-year term.

Each region has a **president's council** made up of all affiliate chapter presidents within a region. A president's council meets regularly to discuss issues of the region and serves as a communication tool between the board of directors and the affiliate chapters via the region representative.



The region representative is the communication link between the members out in the community and the governing board. They represent the members' ideas, hopes, and needs

within the national organization and support the goals of affiliate chapters within the region. Typically, region representatives devote two to ten hours a week to the position.

These region representatives work not only on the broad issues affecting the entire profession, but also work closely with the affiliate chapter presidents and members of the state and local chapters on issues special to their areas. The region representatives post national, regional, state, and chapter information on the region's Facebook page and provide reports on the activities in their region in RID's *e-NEWS*.

Duties of a Region Representative

- A. Provide reports regarding the activities of the RID Board of Directors, national committees and the national office to each affiliate chapter within the region. This can be done via email, mail, or conference calls. Conference calls are generally held every two to three months.
- B. Provides reports at least quarterly to the board and the national office during meetings. Reports should reflect the special issues and/or concerns expressed within the region.
- C. Convenes and presides at any regional meetings/conference and conference calls, including president's council meetings and facilitates development of regional activities.
- D. Attend workshops and conferences in the region, when able and funds are available, using the region budget and funds from the hosting affiliate chapter as available.
- E. Serve as a resource person to affiliate chapter presidents and members within the region.
- F. Submit regular reports to RID's newsletter.
- G. Assist affiliate chapters within the region in their ability to meet affiliation requirements.
- H. Assist any chapter not in compliance with RID's affiliation requirements in moving toward compliance or dissolution. In the event of dissolution or no further recognition of a chapter, the regional representative will ensure the collection and forwarding of all required information to the national office.

- I. Serve as one of the national conference committee core group members and participate in recruiting the conference chair(s) when the national conference is being hosted in the representative's region.
- J. Assist in the annual reviews of the RID chief executive officer and the chief operating officer.

Affiliate Chapters

Affiliate chapters are crucial in RID's overall structure as they help RID Headquarters reach the national community of interpreters. The affiliate chapters of RID are divided into five regions, covering all fifty states and Puerto Rico. Each region is represented by an elected region representative, who serves on RID's Board of Directors for a period of two years.

RID has chapters in all but two states and the District of Columbia. Chapters initiate local programs and activities as well as work towards national and regional goals. Affiliate chapters may act together cooperatively, often as a region. For example, chapters may band together when sponsoring a regional conference or passing state legislation.

While the affiliate chapters are autonomous entities, their memberships overlap with national membership. Individuals serving the affiliate chapter in any elected leadership role such as a chapter board position must be an RID member. Affiliate chapters must also honor the **dual membership agreement** between the national organization and the affiliate chapters requiring a voting member of the affiliate chapter must be a member at the national level; likewise, a voting member of the national organization must be a member of an affiliate chapter. By being affiliated with the national organization, affiliate chapters agree to certain standards and accept specific responsibilities within the organization. The affiliate chapters provide input to and accept direction from region representatives in advancement of the national organization and affiliate chapters.

Affiliate Chapter Acronyms

Region I

Central New York RID	CNYRID
Connecticut RID	CRID (Same as Colorado)
Genesee Valley RID	GVERRID
Long Island RID	LIRID
Maine RID	MeRID
Massachusetts RID	MassRID
New Hampshire RID	NHRID
New Jersey RID	NJRID
New York City Metro RID	NYCMetroRID
Pennsylvania RID	PARID
Rhode Island RID	RIRID
Vermont RID	VTRID

Region II

Alabama RID	ALRID
Florida RID	FRID
Georgia RID	GRID
Mississippi RID	MSRID
North Carolina RID	NCRID
Potomac Chapter RID	PCRID
South Carolina RID	SCRID (<i>Same as Southern California</i>)
Tennessee RID	TRID
Virginia RID	VRID

Region III

Illinois RID	IRID
Indiana Chapter RID	ICRID
Kentucky RID	KyRID
Michigan RID	MiRID
Minnesota RID	MRID

Ohio Chapter RID	OCRID
Wisconsin RID	WisRID

Region IV

Arkansas RID	ARID
Colorado RID	CRID (<i>Same as Connecticut</i>)
Iowa State RID	ISRID
Kansas RID	KAI-RID
Louisiana RID	LRID
Missouri RID	MO-RID
Montana RID	MRID
Nebraska RID	NeRID
New Mexico RID	NMRID
North Dakota RID	NDRID
Oklahoma RID	OKRID
South Dakota RID	SDIA-RID
Texas Society of Interpreters for the Deaf	TSID
Wyoming RID	WYORID

Region V

Alaska RID	AKRID
Arizona RID	AzRID
Central California RID	CCRID
Hawaii RID	HRID
Idaho RID	IRID
Nevada RID	NRID
Northern California RID	NorCRID
Oregon RID	ORID
Sacramento Valley RID	SaVRID
San Diego County RID	SDCRID
Southern California RID	SCRID (<i>Same as South Carolina</i>)
Utah RID	UtRID
Washington State RID	WSRID

ESTABLISHING AN AFFILIATE CHAPTER

Article VIII in RID's Bylaws states:

Any group of at least twenty (20) individuals, each of whom qualifies for membership in the corporation as a voting member may make an application for affiliation following the procedures and requirements as outlined in the Policies and Procedures Manual. Any affiliate chapter may remain affiliated with RID so long as it complies with the provisions of these bylaws and the Policies and Procedures Manual. In order to be a voting member of an affiliate chapter, a person must also be a member in good standing of RID. Elected officials, officers, and board members of any affiliate chapter of RID must be members in good standing of this corporation.

The Registry of Interpreters for the Deaf (RID) consists of 55 affiliate chapters (ACs) at the time of this handbook's publication. These chapters exist throughout the United States and territories, and have met requirements as set forth by RID. Current policy prevents states with an existing affiliate chapter from forming additional chapters. At the time this policy went into effect, some states already had multiple chapters. These previously established chapters were not required to disband. Therefore, some states do have multiple chapters; however, most states have only one.

Affiliate chapters are able to fit the unique needs of an area better than the larger, national organization. Affiliate chapters provide an easier way for local interpreters to network and attend local professional development opportunities. Participation in a local ACs assists the development of leadership skills in incremental steps. Someone who is hesitant to become involved at a regional or national level may be willing to serve in a leadership role at a local or state level. Many of the national RID officers began volunteering at the affiliate chapter level before moving into a regional or national role.

Starting a new affiliate chapter takes leadership, organization and determination. Remember to use the support of the RID Board of Directors, RID Headquarters, and other affiliate chapter presidents along with local RID members.

Requirements

1. Organize a group of at least twenty (20) voting members of RID desiring to start an affiliate chapter.
2. Assign a leader or small group of leaders to spearhead the effort. This person or group would oversee compiling the necessary information for the application for affiliation, which must include the following:
 - A list of at least twenty voting members of RID
 - A copy of the chapter's bylaws
 - A list of the names and contact information for the chapter's officers
 - A copy of the chapter's Articles of Incorporation (if applicable)
 - A copy of the chapter's Standing Rules or Rules of Order (if chapter has same).
3. The affiliate application package, once complete, must be sent to the Director of Member Services at RID Headquarters.
4. The Director of Member Services will verify that all the petitioners are RID voting members in good standing.
5. The Director of Member Services will act as the liaison to the RID Board of Directors by presenting the package to the Board.
6. Once the Board of Directors formally approves or declines chapter status, the Director of Member Services will notify the contact person from that potential chapter.
7. If approved, the chapter will then be considered affiliated with RID.

Once the chapter is established, the chapter will have a formal, ongoing relationship with RID. See the next section for information on the benefits of this affiliation. To maintain an affiliated chapter, the chapter must comply with the following criteria:

1. Any elected volunteer leadership roles within the affiliate chapter such as a board position must be an RID member in good standing.
2. Voting members of the affiliate chapter must be a member at the national level, in keeping with the Dual Membership Agreement.
3. Annual reports (see annual reports section in this handbook) must be complete and submitted in a timely manner.

By being affiliated with the national organization, affiliate chapters agree to certain standards and accept specific responsibilities within the organization. The affiliate chapters provide input to and accept direction from region representatives in advancement of the national organization and affiliate chapters. Similarly, affiliate chapters may be called upon to guide the development of the national organization and other affiliate chapters.

Benefits of Becoming an Affiliated Chapter

Advocacy

- Affiliation with national interpreter advocacy actions
- Representation for the affiliate chapters' members for various national issues (e.g. VRS via the Video Interpreting Committee)

Support

- Reduced sponsor fees for CMP
- Listing on the RID website
- Space at conferences (National and Regional)
- Insurance discounts - Directors and Officers, Events, etc.
- Access to support through RID's online groups for chapter presidents
- Access to the staff at the RID national office
- Access to RID committees (e.g. Bylaws Committee, Video Interpreting Committee, Scholarships and Awards Committee)
- Letters of support
- National representation during testifying on state laws affecting interpreting

- Use of RID's group exemption to get 501(c)3 non-profit status

Resources and Information

- Eligible for grants through RID
- Webinars/Leadership Workshops
- Complimentary contact list of members in their state
 - One (1) per quarter
- Free use of ALDs for events
 - AC pays shipping fees
- Access to GoToMeeting
- Annual Compliance Newsletter
- Information and Referral and Technical Assistance (e.g. conference insurance, filing forms with the IRS, etc.)
- Referrals from RID for members to join your chapter (members must be a member of an affiliate chapter to vote on the national level).
- Resources for running your organization (e.g., the Affiliate Chapter Handbook)
- Access to the affiliate chapter presidents' google groups
- Membership in a regional presidents' council

Mission Statement

A strong mission statement is one sentence describing the reason an organization exists and what they do. In simple terms, a mission statement informs readers of the who, what, how, and why of the organization. The following questions should be clearly answered by an organization's mission statement:

- Who are the members of the organization?
- Who benefits from this organization?
- What is the main priority of this organization?
- How does the organization serve the community?
- Why does the organization serve the community?

Examples of mission statements

Registry of Interpreters for the Deaf, Inc.

The Registry of Interpreters for the Deaf is a professional organization for interpreters who use signed and spoken languages. As members of RID, we commit to providing ethical, high-quality interpreting services for our clients; we also commit to our own continuous professional development.

The National Association of the Deaf

The mission of the National Association of the Deaf is to preserve, protect and promote the civil, human and linguistic rights of deaf and hard of hearing people in the United States of America.

The Conference of Interpreter Trainers

CIT's purpose is to encourage the preparation of interpreters who can effectively negotiate interpreted interactions within the wider society in which Deaf people live. As such, one of our primary goals is to increase our students' knowledge concerning the Deaf community, linguistic rights and our role in the preservation of ASL. CIT seeks to accomplish its mission by fostering teaching practices and research that help educate compassionate, engaged professional interpreters who will exhibit cultural and linguistic fluency, sophisticated interactional competencies and who are sensitive to issues of privilege. We also seek to advance teaching practices that lead to a deepening of cross-cultural awareness and to guide students to interpreting practices that are based in the norms and values embraced by the Deaf community by providing arenas for the sharing of these ideas.

Creating a Mission Statement

The first step in designing a mission statement for the organization is assigning the authors. Create a committee tasked with developing and writing the mission. Also consider tasking

the same committee to identify organizational values and the vision statement, which will guide organizational goals and influence future decisions. The committee should be a diverse group, with different experiences and identities. Consider including stakeholders such as members of the Deaf community, retired or student interpreters, employers of interpreters (e.g. school systems, businesses, referral agencies, government agencies), and individuals with experience in leadership and organizational planning.

Once this committee is assembled, a chair is appointed by the president of the board or elected by the members of the committee. The chair sets the time and place of the meetings, preparing an agenda, coordinates arrangements for any speakers or consultants, makes arrangements for meeting minutes, facilitates the meetings, and reports back to the chapter board or board liaison. In order to distribute the workload, the chair may delegate these duties if needed.

The first action of the committee is to conduct a needs assessment, if one has not already been completed. Research the local community and learn how the affiliate chapter can best serve their membership. Attend local events, survey stakeholders, host forums, study current standards and legislative issues, and reach out to the larger national community. The results of the needs assessment will guide both the mission statement, the vision, and the goals of the organization.

When drawing up the first draft of a mission statement, it may be helpful to brainstorm a list of words and phrases that represent the organization. Take plenty of time and let creativity flow. Once a list is made, assign one or two individuals at most to craft a draft statement that aligns with community needs. Check your mission statement to see if the questions of who, what, how, and why are answered within the statement and revise if necessary.

Share the draft with the committee and, once it is agreed upon, share the mission statements with stakeholders for additional input. Also, show the statement with people not associated with the organization or its function. What seems clear from the inside may be

confusing jargon from the outside. Ask these people to review not only the mission statement, but also the organization's vision.

After consideration of all the feedback, the mission statement is ready for board review. The board will obviously have some questions and suggestions for the committee. A smart board, however, will not duplicate the discussions and work of the committee. The board selected the committee members and now the board must trust in the committee's work. Understand that the mission state may not be perfect or all-encumbering; it is a launch pad and compass for the organization, not necessarily the destination.

Values and Vision

While the mission statement is the organization's compass, the vision statement is the destination. A strong vision statement inspires members, guides decisions, and measures the success of the organization. The vision statement and organizational values can be developed alongside the mission statement, or they can be created after the affiliate chapter is established. Creating a vision and defining values can bond new affiliate chapter members together, creating a stronger foundation for the fledgling organization.

Organizational values provide common ground and guides member behavior and decisions. The needs assessment conducted for the mission statement can also inform the organizational values. What values were most cherished and defended? Brainstorm a list of values, grouping similar values and narrowing the list down to the top four or five. These values will influence the day to day decisions of the affiliate chapter board. It may be helpful to use alliteration or another method of making the values easy to remember. For example, RID's board values all begin with the letter "R": Roots, Respect, Relevance, and Results or the "Four R's." The board developed specific action items for demonstrating each value.¹ These are the guiding principles that help the board navigate through difficult decisions.

¹ <https://www.rid.org/about-rid/mission-vision-statements/board-of-directors/board-values/>

The vision statement envisions the ideal outcome the organization is working towards. Initially, the reality – particularly what is not wanted – may be in the forefront when discussing the organization’s vision. For example, it may be easy to state that local interpreters feel isolated. Or the organization recognizes a lack of inclusion within the community and wants to reduce oppressive behavior. These are important issues, but these are not the vision. The vision would be a community where members feel connected and support, in an atmosphere of inclusion. A vision statement must be written in a way that inspires people, not in a way that highlights a problem. Check to see that the vision statement clearly defines what the organization is striving for and not what the organization is fighting against.

Once the writing process is completed and the documents are approved by the chapter board, publish the values and vision statement along with the mission statement. They are the foundation that focuses the energy of individual members and the organization as a whole. Keep them in the foreground of board meetings. Publish them on the chapter’s website, on promotional materials, and post them at meetings and activities. This will ensure that the organization never loses sight of the organization’s mission, values, and vision.

Organizational Goals

After completing a local needs assessment, involve the entire membership and community in setting organizational goals. People will more readily participate when they feel ownership of the goals. Broader input can be collected through several means, such as a community forum or an online survey. Ask the participants to rank the identified needs or add any needs that may have been overlooked during the initial needs assessment.

Have the board or assigned committee review all the ideas from the needs assessment. Prioritize them based on the members’ responses and the committee’s or board’s opinion. Concentrate on those deemed most vital and eliminate ones that fall outside of the organization’s mission. It may be tempting to tackle as many needs as possible or ones that

fall outside of the AC's mission, but this will increase the risk of burn out and ultimately threaten the stability of the organization. Keep all goals aligned with the and within reason.

Next, turn the broader goals into specific, clear, actionable items. A common strategy is the use of a SMART Goal. SMART is an acronym, each letter standing for a characteristic of a good goal. Create a goal that is as *specific* as possible, *measurable* with trackable milestones and results, *attainable* by the affiliate chapter, *relevant* and worthwhile, and *timely* with clear deadlines.



Articles of Incorporation

A nonprofit Articles of Incorporation is a legal document filed with the secretary of state to create a nonprofit organization, or corporation. This process is called incorporating and is required to establish a non-profit organization such as an RID affiliate chapter. In some states, the Articles of Incorporation is called a certificate of incorporation or corporate charter.

This simple [Articles of Incorporation example](#), also found in the additional resources at the end of this handbook, shows what is expected. Check the secretary of state website for your

state's Articles of Incorporation template. Take the time to research requirements and bring any questions to the department of the secretary of state. Be sure to comply with all of the state filing requirements.

Incorporating provides several important benefits:

- Registers your organization's name
- Limits the personal liability of the directors and members
- Adds credibility to the organization
- Paves the way for 501(c) federal tax exemption

After securing the affiliate chapter's corporate name by receiving state approval of the Articles of Incorporation, use the same name to apply for a Federal Employer Identification Number (FEIN), open financial accounts, and sign contracts.

Immunity from Civil Liability

Nonprofit organizations may protect their board and volunteers from damaging civil lawsuits by including limited liability provisions in the Articles of Incorporation. Check to see if your affiliate chapter's Articles of Incorporation include a limited liability provision. If not, review the document so that provisions may be added.

The nonprofit corporation must check with its specific state laws, but most states permit an organization to adopt provisions in its Articles of Incorporation that will eliminate personal liability of officers and volunteers for certain kinds of risks. Not all states require that such immunity is included in the Articles of Incorporation, but some do. It's best to have the immunity provisions or statutes explicitly written or quoted in the organization's Articles of Incorporation.

Naturally, not all circumstances are immune to liability. For example, a person is not granted immunity if they commit a breach of their duty to the organization, act in a way that involves intentional misconduct or a knowing violation of law, derive an improper personal benefit from an organization's transaction, or commit a grossly negligent act.

In addition to the above exemptions from immunity, having limited liability immunity provisions within the Articles of Incorporation does not negate the possibility of direct legal action being filed against officers and volunteers. Nonprofit organizations should consider insurance for officers and volunteers. See the section in this handbook titled “Non-Profit Liability” for more information.

Nonprofit Status

Nonprofit corporations are created for purposes other than generating profit. No part of the organization’s income may be distributed to directors, or officers, or volunteers. Tax-exempt status must be filed at both the federal and state level. All non-profit organizations must apply for an EIN before filing for exempt status.

When filing for federal tax-exempt status, the organization must match the description offered by Section 501 of the Internal Revenue Code. An RID affiliate chapter typically files Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code. The form can be found at www.irs.gov or call 1-800-TAX-FORM for more information. The application must be postmarked no later than fifteen months after the end of the month when your Articles of Incorporation were filed within the affiliate chapter’s state.

To obtain nonprofit tax-exempt status, the organization must also comply with corporate formalities of annual meetings of its directors or officers and of its members. Bylaws must be adopted for the organization which provide the details of the meeting’s process and procedures. See the “Bylaws” section of this handbook for more information.

IRS may challenge an affiliate chapter’s corporation’s tax-exempt status if IRS views the affiliate chapter as not fulfilling the requirements of section 501(c)(3). If such a challenge takes place and the corporation is found as not meeting the requirements, the AC may be liable for back taxes and tax fines for the period it operated as a tax-exempt nonprofit corporation. If one has questions, discuss the situation with an attorney or an accountant.

Operating Under RID's Status

Affiliate chapters can be incorporated and fall under RID's tax exemption. Incorporation and taxation are two separate matters. Affiliate chapters of the Registry of Interpreters for the Deaf are nonprofit corporations and are considered to hold federal tax-exemption status if the affiliate chapters adhere to the requirements delineated by the national corporation. This would include, but is not limited to, the appropriate filing of reports, names and addresses of current officers (updated each time there is a change), and the filing of an annual financial statement.

Some affiliate chapters may prefer to establish their own identity as nonprofit corporations. The following information will give you guidance as to what to expect and outline the benefits to the affiliate chapter. Even when filing independently of the national office, an affiliate chapter of RID must submit regular documents and reports to the national organization in order to maintain their affiliation with RID.

Benefits of Tax-exemption

If a corporation is granted federal tax-exemption status under section 501(c)(3) of the tax code, the AC will be exempt from payment of federal corporate income taxes resulting in savings for the organization. The chapter will also become eligible for public and private grants, and individual donors can claim a federal income tax deduction of up to 50% of income for donations made to the affiliate chapter.

Other benefits may also include receiving limited liability protection similar to what for-profit entities receive. This means that directors or trustees, officers, and members are typically not personally responsible for the debts and liabilities of the organization. Nonprofit corporations can benefit from a lower postal rate for bulk mailings.

Also, a nonprofit corporation's life is not dependent upon its members; rather, it possesses the feature of unlimited life. Original or charter members may pass on or leave the organization, but the corporation may continue to exist and conduct business.

Disadvantages of a Nonprofit Corporation

Nonprofit corporations experience a large amount of paperwork. Articles of Incorporation must be filed with the state, bylaws prepared and adopted, and meeting minutes of the board of directors and of the membership must be kept with corporation records.

Applications for tax-exempt status must be filed at both the federal and state levels, if the state allows for tax exemption. The corporation must remember that nonprofits cannot be used to generate profits for the directors or officers and the purpose must conform to IRS regulations.

IRS code section 501(c)(3) prohibits certain political activities. The code requires that the organization “does not participate in or intervene in (including the publishing or distributing of statements) any political campaign on behalf of, or in opposition to, any candidate for public office.” This is considered an absolute prohibition. The seemingly insubstantial or slightest amount of political campaign activity may result in a loss of tax-exempt status. Non-paid individual lobbying activities are not impacted by these prohibitions.

Lobbying

Lobbying activities relate to social issues and laws. A non-profit organization’s participation in this arena is not prohibited. However, be careful not to misstep in this area with the campaign of a candidate who happens to support your cause. The IRS allows for nonprofit corporations to have an insubstantial amount of lobbying or legislative activity. Usually, this means that not more than five percent (5%) of the nonprofit corporation’s overall activities, financial expenditures, staff hours and/or other measurable standards may be used towards lobbying or legislative activities. If the nonprofit organization exceeds this guideline, their 501(c)(3) status will be revoked

If a nonprofit organization wishes to engage up to twenty percent (20%) towards lobbying or legislative activity, they must apply using the IRS form 5768 [the 501(h) election]. Special rules and limitations do apply for such corporations to follow, most importantly, a 501c3 organization may not lobby for any specific political candidate running for an office.

When becoming involved with legislation and social issues, do your homework. Know the name of your council member or state representative and congress members. Familiarize yourself with their political party and committees.² If your chapter is involved in specific legislation, find current, similar legislative bills.³ Reach out to other affiliate chapters who have worked on similar bills. Partner with the local chapter of NAD to include the Deaf, Hard of Hearing, and DeafBlind community perspective. A joint force will give your piece of legislation more weight.

IRS Audits

If the affiliate chapter operates under the nonprofit status of RID and has not filed for separate incorporation and tax-exempt status, then the affiliate chapter must follow the reporting procedures as outlined in the “Establishing an Affiliate Chapter” section of this handbook.

Affiliate chapters must comply with [IRS document retention guidelines](#). Non Profit organizations that must respond to an IRS audit will need to be prepared for review of the following:

1. Governing documents, copy of exemption determination letter
 - Received from the state showing approval as a nonprofit corporation
2. Minutes of meetings (board of directors/officers and general membership)
 - usually several years’ worth are requested
3. Financial records
 - E.g. check register, canceled checks, bank statements, invoices, receipts, and auditors report and working trial balance
 - 990s for years before and after specific year under audit
 - Copies of all other federal tax and information returns filed
 - E.g. 940, 941, W-2, W-3, 1099 and 1096
 - Pamphlets, brochures, descriptive literature, etc.

² www.usa.gov/elected-officials

³ To find current bills, start here: www.govtrack.us/congress/bills/

- Newsletters, if the organization publishes one

Duty to Disclose

In general, tax exempt organizations must make certain documents public, such as annual returns and applications for exemption. If an individual requests copies of annual returns and applications, the organization is obligated to share this information within 30 days. Covered tax documents include the organization's application for tax-exempt status and its annual returns for a period of three years beginning on the date the return is required to be filed.

The IRS is required to disclose information they receive from exempt organizations, including RID and its affiliate chapters. Because of this, do not include personal information, such as Social Security numbers, or bank account numbers on any forms (e.g. IRS 990) submitted for the organization. If the organization would like a copy of the documents, see the IRS website, Publication 557, and Form 4506A.

Paying Taxes

While the IRS may have different requirements, RID requires all Affiliate Chapters to submit a Form 990 EZ or Form 990 by September 15th of each year. ACs must send in Form 990 (long or EZ) no more than 90 days after the close of the fiscal year. In accordance with Motion 2006.09, all AC fiscal years must align to RID's fiscal year of July 1 - June 30. Form 990-N and e-Postcards are not acceptable to submit to RID headquarters.

Please refer to the IRS website for guidance on due dates, forms required, and other FAQ related to compliance with federal tax codes. The information on the website is guaranteed to be the most current and most comprehensive available. If you are unable to file in the appropriate time frame, make sure to file for an automatic three-month extension by using Form 8868. The consequences of not filing the appropriate documents in a timely manner can range from a loss of the organization's 501(c)(3) status to a \$10,000 fine. For all possible consequences of not filing, please refer to the IRS website.

Even if the organization is filing an extension, payment is still due before 8pm Eastern on the day the tax return was originally due, not the extended due date. Any payments made (e.g. employment tax, excise tax, and/or corporate income tax) must be paid electronically. The IRS system for electronic payment is called the Electronic Federal Tax Payment System, or EFPTS. For more information about paying tax liabilities for the organization, please visit the IRS website for the most current and comprehensive guidelines.

Nonprofit Liability

Nonprofit organizations are established with the goal of improving the quality of individual or community life. Volunteers are the fuel that keeps nonprofit organizations in operation. With the number of nonprofit organizations on the rise and millions of volunteers utilized in a variety of roles, it is inevitable that on occasion, a volunteer may be injured while serving a nonprofit organization. On the other hand, the actions of volunteers may, in some form, undermine the nonprofit organization's operation.

Affiliate chapters should consider three specific areas of protection depending upon the nature of the affiliate chapter's organizational structure, activities, and community involvement:

1. Protection or insurance for volunteers acting on behalf of the affiliate chapter in a variety of roles;
2. Protection for the organization against willful actions of volunteers while serving in a variety of roles; and
3. Protection against fraud by any volunteer functioning in a role related to the financial operations of an affiliate chapter (such as treasurer).

For a more thorough look at insurance and liability considerations, review the [Liability Checklist](#).

Volunteer Protection Act

Through the years the concept of charitable immunity has been abolished. Nonprofit organizations are being required to take responsibility for their actions and the actions of their representatives, meaning people acting on the behalf of the organization such as employees, volunteers, and clients.

Many states have since established legislation pertaining to the legal liability of volunteers, however these statutes lack in uniformity and consistency. Each affiliate chapter is encouraged to seek out such legislation within its specific state to establish what their legal responsibilities are.

The [Volunteer Protection Act](#) (VPA) preempts state laws that are inconsistent with the VPA. If state laws require additional protection from liability for volunteers, then that requirement would not be preempted. This Act applies to 501(c)(3) organizations and provides immunity for volunteers serving nonprofit organizations from harm caused by their acts or omissions if:

1. The volunteer was acting within the scope of his/her responsibilities;
2. Appropriate or required, the volunteer was properly licensed, certified or authorized to act;
3. The harm was not caused by willful, criminal or reckless misconduct or gross negligence;
4. The volunteer operating a motor vehicle, vessel, or aircraft did not cause the harm.

Other provisions that a state may build into state legislation that would not be preempted are as follows:

1. The requirement that a nonprofit adhere to risk management procedures;
2. Laws that make a nonprofit liable for the acts or omissions of its volunteers to the same extent that an employer is liable for the acts or omissions of its employees;
3. Provisions that render the immunity inapplicable if an officer of a state or local government brought the civil action; and

4. Provisions that limit the applicability of immunity to nonprofits which provide a “financially secure source of recovery,” such as insurance.

Insuring Volunteers

An affiliate chapter may wish to consider liability insurance for their directors and officers.

This type of policy helps cover the defense costs, settlements, and judgments arising out of lawsuits and wrongful act allegations brought against a nonprofit organization or its officers.

Directors and Officers (D&O) liability insurance varies greatly due to the differences in coverage, premiums, limitations and deductibles. Such policies are often costly, especially for a small organization. If such a policy is needed, obtain several quotes from a variety of carriers and request for the provisions considered most critical. Most D&O policies exclude coverage for bodily injury or property damage and address the actual or alleged acts of omissions including breaches of duty that the directors, officers or other insured individuals may perform.

The organization may also want to consider separate protection against injury. The decision whether the nonprofit can be held liable for the injury of a volunteer is related to several factors including the age of the volunteer, organization representation and oversight, and the circumstances of the accident. If an affiliate chapter decides that the insuring of volunteers against accidents or injuries is of importance, there are two primary insurance options to consider: accident and injury policies and worker’s compensation.

Accident and Injury Policies: This coverage for volunteers finances the cost of medical treatment for volunteers who are injured while delivering services for the organization. This kind of policy will pay a claim regardless of who is at fault but tends to be an “excess” insurance policy, paying only after other available insurance policies have been exhausted.

Preventing Fraud

A fraudulent act against a nonprofit organization can be devastating - ranging from a cash flow crisis and loss of donor confidence to the closure of the organization. Affiliate chapters must be aware that nonprofit organizations are more vulnerable to fluctuations in income streams or other assets, thus a single major theft of funds or equipment could seriously jeopardize the affiliate chapter's existence. **Fidelity insurance** coverage provides protection against loss of funds due to embezzlement activities on the part of officers and/or employees. It is imperative that this coverage be in effect to protect the affiliate chapter's resources. **Bonding** the treasurer (highly recommended but not required) provides some insurance if the treasurer should misuse funds.

Other measures that affiliate chapters may take toward reducing the risk of any fraudulent activities from occurring include:

1. Having appropriate authorizations and approval guidelines in place.
 - a. Limit the number of people with decision-making authority for financial transactions.
 - b. Adopt a procedure for the approval of all financial transactions.
2. Creating proper documentation procedures.
 - a. Establish accounting procedures to ensure that transactions are recorded correctly.
 - b. Minimize the possibility of fictitious transactions.
3. Have a policy that defines the physical security of the affiliate chapter's resources.
 - a. Control physical access to money, securities, and valuable property.
 - b. Control indirect access (documents or digital) to money, securities, and valuable property
4. Develop a checks and balances system. Establish a safety net so if someone overrides or disregards your internal policy, you can quickly detect and correct the breach.

Chapter Budget

Affiliate chapters also may protect the financial resources by preparing a complete budget that requires the involvement of multiple members of the chapter. All officers, committee members and individuals in charge of special programs must contribute to the process of creating a budget. Budgets are not to be left to the treasurer alone. It is the financial plan for the chapter and helps determine priorities for the organization.

Every year, affiliate chapters must submit financial documents to RID headquarters to remain in compliance. This could be documentation of an audit or simply a certified copy of the chapter's annual finances. This document is typically developed through an audit conducted by a CPA, the Board of Directors, or a separate finance committee. The finance committee should be appointed, non-board members of the organization and the treasurer as the ex-officio member of the committee. This committee serves an important role in preparing for the external audit or financial review. Audits are a key part of an affiliate chapter's financial accountability and enhance the credibility of the financial statements. Proper stewardship of the chapter finances increases the trust between the AC officers, the membership, and the parent organization, RID.

RUNNING AN AFFILIATE CHAPTER

Annual Report

To be considered an AC in good standing, ACs must submit an annual report with the following information:

- Current contact information of the Board of Directors
- Membership list
- Copies of letters regarding political actions
- IRS Form 990 or 990 EZ
- Financial statement that has been certified/approved by the board or an auditor and includes all revenue and disbursements in the Fiscal Year

These documents must be submitted to the national headquarters at compliance@rid.org by September 15th each year. If an AC does not provide an annual report, they are considered non-compliant.

Each RID region representative is responsible for monitoring compliance of each affiliate chapter in the region. If these requirements are not met, the chapter's region representative will discuss the situation with the affiliate chapter's board of directors. At that time, the chapter must determine if they wish to move toward compliance or dissolve the chapter.

Know Your Organization

A volunteer leader within an affiliate chapter should become familiar with the workings of the national organization in addition to knowing their local affiliate chapter. Who are the RID board members? When and how should the region representative be contacted? Who are the RID staff and which departments do they oversee? Which RID committees can address specific membership or affiliate chapter board questions? The RID website can be valuable resource as can the region representative. See the RID section at the beginning of this

handbook or browse the resource section at the end for more information on various topics of interest to leaders within RID.

To know the answer to every question is impossible. A good leader admits what they don't know, and offers to help find the answer. A large part of leadership is connecting the member with the correct person who can address the member's needs. If the answer to the question is not in the handbook, reach out to the national office or the region representative for more assistance.

Connecting with other affiliate chapters is a beneficial way to learn more about RID as a whole. The affiliate chapter president or designee participates in regional presidents' council calls via video conferencing. These meetings, which take place quarterly in most regions and last two to three hours, are arranged and moderated by the RID region representative and are a wonderful way to share information and ideas with other ACs. These meetings also provide a chance for AC presidents to stay abreast of current events within the national office and other affiliate chapters in the region.

Important Emails

RID Member Services: members@rid.org

RID AC Compliance: compliance@rid.org

Region 1 Representative: region1rep@rid.org

Region 2 Representative: region2rep@rid.org

Region 3 Representative: region3rep@rid.org

Region 4 Representative: region4rep@rid.org

Region 5 Representative: region5rep@rid.org

Bylaws

Bylaws are the backbone of the organization. The affiliate chapter bylaws need to be concisely written to give the organization necessary structure and support. Bylaws are the most important rules that the affiliate chapter can create for itself. The content will impact

the rights and duties of all members of the organization. Below are some pointers, taken from "Robert's Rules of Order - Newly Revised," on constructing bylaws.

1. In order to give the organization the greatest freedom to act within its purview, bylaws should be made no more restrictive or detailed in specification than necessary.
2. Each sentence should be written to be impossible to quote out of context and so worded that it does not compel the reader to refer to adjoining sentences.
3. Provisions of a temporary nature or relating to the mechanics of transition from old bylaws to new bylaws should not be included within the bylaws.
4. *Each society decides for itself the meaning of its bylaws.* If a bylaw is ambiguous it must be interpreted, if possible, in harmony with the other bylaws. Where an ambiguity exists, a majority vote is all that is required to decide the question. When a provision of the bylaws is susceptible to two meanings, one that conflicts with or renders absurd another bylaw provision, and the other meaning does not, the latter must be taken as the true meaning.
5. A general statement or rule is always of less authority than a specific statement or rule and yields to it.
6. There is no valid reason for authorizing certain things to be done in the bylaws that can clearly be done without the authorization of the bylaws.
7. Any change to the bylaws requires a two-thirds affirmative vote (of those who respond) AND sufficient notice. The only exception is an amendment to a motion that is a lesser modification than what was proposed.
 - a. Example: Notice was given of the desire to increase dues from \$10 to \$25 per year. An amendment comes from the floor to strike \$25 and replace with \$20. Since this amount is a lesser modification than what was proposed - \$10 to \$20 instead of \$10 to \$25 it is allowable. HOWEVER, a motion to decrease the dues to less than \$10 or to more than \$25 would be out of order.
8. Outside laws and/or higher parent organizations' bylaws take precedence over provisions in a lesser society's bylaws. Local chapter bylaws cannot supersede RID's affiliate chapter requirements.

9. Use consistent wording. Example: Do not write “30 days” in some places and “one month” in others. Choose one and stick with it. Choosing an exact number of days will remove any ambiguity.
10. Do not explicitly list items that are subject to change without amending the bylaws. Example: Do not list dues amounts or committee names if the president, board or other authorized member has the power to change them.

Policy and Procedure Manual

While the bylaws of an organization tell you what to do, the policy and procedure manual (PPM) explains how to do it. The bylaws can be thought of as an outline, the PPM as the details.

A well-written policy and procedure manual can improve your organization by establishing clear guidelines, setting procedures, and communicating organizational knowledge. Relying on “understood” policies can lead to confusion and misunderstandings. Organizations use their PPM to provide consistency for their volunteers, an important feature for an affiliate chapter given that most volunteer terms last one to two years. Information is more easily, and more accurately, passed down when documented in a PPM.

Topics that can be included in a PPM include:

- Mission, vision, and values of the organization
- An organizational chart outlining who reports to who
- Duties of affiliate chapter officers (including timelines)
- Mission statements and Scope of Work (SOW) for committees
- Communication policies for board and/or membership meetings
- Processes for removing of an individual from their elected or appointed position
- Procedures for fundraising or workshop planning
- Board reimbursement policy
- Record retention policy
- CEU application procedures and timelines

- Location/timelines of meetings
- Accounting practices
- Bylaws

Several RID affiliate chapters have well-developed PPMs that can be seen on their websites. Remember, not all affiliate chapters have the same needs. An affiliate chapter is not a static organization, so the PPM should remain flexible. It is a living document that can change when needed. Composing the first PPM can seem like a monumental task, but will provide guidance and direction for future officers of the organization. To keep the manual current, delegate a board member or two to periodically review the PPM and bring proposed changes or updates to the entire board. To promote transparency between the board and the members, share the policy and procedures manual publicly with the membership.

Rules of Order

Familiarization with Robert's Rules of Order (RRO) is important, but memorization is not mandatory. Attend a few local meetings of other organizations where RRO are followed to get a feeling for the flow of a business meeting (e.g., city or county council, local chapter of the National Association of the Deaf). Any procedural item that is not specifically addressed within your affiliate chapter bylaws should be addressed within *Robert's Rules of Order - Newly Revised* (RRO).

Business meetings should be conducted in accordance with RRO; however, since RRO may seem very formal, affiliate chapters may decide to conduct less formal meetings. In the event of a contested issue or large group of individuals, reverting to the formality of RRO is recommended. Members of the affiliate chapter (especially the board of directors) should become familiar with RRO for running business meetings. Bummy Burstein's book, *Bummy's Basic Parliamentary Guide*, provides an excellent, easy to use guide on RRO and running business meetings.

When is it acceptable to be a little less formal?

In a board meeting where there are a dozen members or less present, some of the formality that is necessary for a large assembly becomes a hindrance. The rules governing smaller meetings are different, in the following respects:

- Members are not required to obtain the floor before making motions or speaking, which they can do while seated.
- Motions need not be seconded.
- There is no limit to the number of times a member can speak to a question, and motions to close or limit debate generally should not be entertained.
- Informal discussion of a subject is permitted while no motion is pending.
- Sometimes, when a proposal is perfectly clear to all present, a vote can be taken without a motion's having been introduced. Unless agreed to by unanimous consent, however, all proposed actions of a board must be approved by vote under the same rules as in other assemblies, except that a vote can be taken initially by a show of hands, which is often a better method in such meetings.
- The chairman need not rise while putting questions to vote.

The chairman can participate in a discussion without rising or leaving the chair; and, if the rules of that specific board allows, the chairman can make motions and usually votes on all questions.

Meetings

Meetings are held for specific reasons. To respect the time of all attending, it is essential to have clearly stated goals and timeframes that are followed throughout the meeting. Agendas, which should be distributed prior to the meeting, list the order of business and timeframes which keep people on track during the meeting (see example [Order of Business](#)). Some organizations ask for additions to the agenda at the beginning of a meeting. Some ask for additions prior to the meeting, and if none are submitted, the agenda cannot be altered during the meeting. Decide what is best for your organization and be consistent, outlining the preferred practice in the Policy and Procedure Manual.

Some affiliate chapters have established the practice of collecting reports prior to the meeting. This means that all reporting board and committee members must send an advance copy of their report to the chair. Set up a shared drive or an easy way for the board to share the reports and establish a specific deadline to assure reports are done in a timely manner. When reports are submitted prior to the meeting, board members are expected to have read the reports before attending the meeting and come prepared with any questions. If no questions are asked, the reports can be accepted, and business can move forward quickly. Submitting reports in advance also supports the secretary in maintaining complete records for the organization.

Conflict at Meetings

Managing conflict is a skill that requires much patience and diplomacy on part of the organizational leader. For members who tend to repeat points or who regularly become long-winded; gently remind them of the time constraints. If necessary, ask that the point be discussed at the committee or small group level with a summary brought to the table. Lay ground rules that limit repetitive comments but still allow for a show of support (for example, members are encouraged to sign “seconded” or “I agree” to show their support for a colleague’s statement but discouraged from taking the floor to state a similar opinion.)

When faced with a member who dominates the meeting or belabors a point, the meeting leader can acknowledge their perspective, reinforcing respectful discussion practices, while giving others an opportunity to counter comment. Avoid escalation or arguments, respecting all perspectives and recognizing the responsibility of the board to honor all opinions. If a particular person is disruptive or disrespectful, a private discussion with the individual might be best. If helpful, refer back to the organization’s values or the RID Code of Profession Conducts which requires demonstrated respect for colleagues.

A member who continuously brings up the negative aspect of every idea may be naturally resistant to change. They will imagine the worst-case scenario for any situation and may use scare tactics to avoid participating in a project or task. Arguing is not likely to appease this individual but a leader who maintains an optimistic and authoritative demeanor will help the

situation. It is not necessarily harmful to project worse case scenarios if the best (and mid-range) cases are also considered.

If conflicts between members or board members reach an impasse, consider bringing in a neutral party such as the region representative, a board member of another affiliate chapter, or an experienced mediator. Identify common goals and work collaboratively towards a mutual agreement or compromise. If it becomes necessary to remove the member from their elected or appointed position, refer to the affiliate chapter's bylaws and Policy and Procedure Manual for removal procedures. The decision to remove an individual from their position should not be made lightly; however, the needs of the organization, not the individual, should come first.

For additional information on conflict management, see the [Tools and Strategies for Conflict Management](#).

Meeting Minutes

Keeping records for a board of directors or committee plays a crucial role as these records provide key documentation of the organization/committee. The only major difference between keeping records for a committee and the board is that the record keeper often does not process the correspondences for the committee whereas most board secretaries do.

Record keepers and secretaries will retain a membership roll of attendees at each meeting (whether it be teleconference, video conference, or face-to-face), keep the minutes of each meeting, and provide a list with action items and timelines established during each meeting.

A competent record keeper is indispensable to a board or committee. Besides recording the events of each meeting, record keepers are responsible for filing the approved minutes, assisting with meeting preparation, and other duties as assigned by the president or committee chair.

General Guidelines

Many members find themselves in the position of taking minutes without knowing the best way to record the minutes. To make the task easier, follow the suggested guidelines for record keepers below.

Ensure that all the essential elements are noted, such as type of meeting, name of the organization, date and time, venue, name of the chair or facilitator, main topics, actions taken by the group such as motions or resolutions adopted, and the time of adjournment. For a more formal process, meetings include approval of previous minutes and all resolutions. Remember, committees do not create motions, only give resolutions to the board of directors. These resolutions may be worded so that they become motions from the board if the board accepts them.

Prior to the meeting, prepare an outline based on the agenda, leaving plenty of white space for notes. By having the topics already written down, the record keeper can go directly to a new topic without pause.

Prepare a list of expected attendees and check off the names as people enter the meeting. In a face to face meeting, pass around an attendance sheet for everyone to sign as the meeting starts. This may be important to do if many visitors attend the meeting; their presence needs to be noted in the minutes. To accurately follow who said what, make a map of the seating arrangement and ask for introductions of unfamiliar people.

Do not make the mistake of recording every single comment. Concentrate on getting the gist of the discussion and taking enough notes to summarize it later. Think in terms of issues discussed, major points raised, and decisions made. Avoid assigning any statements to any person. The meeting minutes are not meant to be a dictation of the meeting.

Use whatever recording method is most comfortable: a notepad, a laptop computer, a tape recorder, a video recorder, a steno pad, shorthand, etc. If applicable, it might be a good idea to make a sound or video recording of important meetings as a backup to the notes. *Before*

recording any meetings, the board/committee members must give their approval to be recorded. Understand these recordings are for the record keeper's use only and are not to be shared.

Notes taken during the meeting are frequently called **process notes**. They may be expansive and include details about discussions of the group. Process notes are used to generate the minutes of the group, which are its official record. While minutes should be preserved for the life of the organization, process notes may be deleted once they are no longer in active use. Process notes are not for public release and are only for use by the secretary and other members of the group.

The note-taker may choose to keep process notes in a shared drive that is accessible to members of the board/committee during the meeting. The benefits to taking notes in this way are multiple. Members who are absent for all or part of the meeting can easily be caught up upon rejoining the session. The group can monitor for accuracy of recording and suggest modifications as appropriate. And, if the note-taker needs to leave the room, another member of the group can easily assume their duties.

If you are the record keeper and also an active participant in the meeting, come prepared! Study the issues to be discussed and have your questions ready ahead of time. If you try grasping the issues while taking notes, they may not make any sense to you later. This does not mean that your dual tasking skills are weak, just that your brain is processing similar functions in different fashions — simultaneously — becoming overloaded. Some boards may decide to use a volunteer or paid note-taker who is not a voting member of the body so that the secretary can focus on discussion and decision-making during the meetings. Under this system, the secretary would still be responsible for using the provided process notes to construct the official minutes of the organization.

Transcribe your minutes while your memory is fresh. Do not wait too long to type up the minutes. Be sure to have the minutes approved by the president/chair and/or committee prior to forwarding to the board of directors.

Concise and coherent minutes are the mark of a professional. The very process of recording minutes can give you a deeper understanding of the issues faced by your committee along with the ability to focus on what is important.

Preparation

- Have ready the minutes of previous meetings and any other material you may need.
- Obtain a list of committee members and an agenda from the chair.
- Prepare a sign-in sheet to pass around. The sheet should request the following of visiting attendees: name, institutional affiliation, preferred mailing address, email address, and designation of member or observer.
- If applicable, you may wish to use a tape recorder or video recorder to backup your notes.

What to Include

- Identify the name of the group.
- Indicate place, time and date of the meeting.
- State kind of meeting (teleconference, video conference or face-to-face).
- List names of board/committee members present (indicate what representation each may have).
- List names of board/committee members absent.
- List observers: indicate name, affiliation and contact information (from sign-in sheet if used).
- If applicable, include a statement that the minutes of the prior meeting were approved, revised or not read.
- Briefly describe main points discussed and state actions taken. A transcript of the discussion is not necessary, but be sure to include actions, votes, resolutions, motions, etc. RID rules require how each board member voted to be reported to the membership in the minutes. Refer to your group's policies and procedures to determine whether this information should be included.
- Keep the minutes to the point. Give complete information but do not ramble.

- A structured format will help keep the minutes succinct. For example, you may wish to use headings such as "Agenda Item" followed by subheadings "Discussion" and "Action Taken."
- Minutes should always be objective and impartial (avoid first person pronouns if possible). They should be factual and devoid of editorial opinions and comments.
- If a member of the board/committee is assigned a task or volunteers for an assignment, state clearly the person's name and the responsibility accepted.
- Record the time the meeting was adjourned and the place, time and date of the next meeting.
- Include recording secretary's signature and typed name (unless identification is given at beginning).
- At the end of the minutes, have all Action Items listed along with the responsible board/committee member and deadlines.

Distribution of Minutes

Transcribe the minutes as soon as possible after the meeting is held but no later than two weeks after the meeting. Distribute them to the board president/committee chair and board/committee for review. Some presidents/committee chairs prefer to review prior to the board/committee and will distribute them to board/committee members and meeting visitors for review. Once any corrections are made and they are approved, the committee record keeper will send the minutes to the Board of Directors. For board minutes, once any corrections are made, they are placed in the official minute book.

Motions

Making a motion is a formal process. Before making a motion, check to see if other motions take precedence or affect the motion. Verify that the motion is in order and whether it requires a second. Other considerations are whether the motion is debatable or amendable and what percentage of vote is required for the motion to pass.

The procedure for making a motion is briefly outlined below:

1. Obtain the floor by raising your hand and waiting to be recognized.
2. Make motion.
3. Wait for a second.
 - a. A second DOES NOT necessarily mean support.
 - b. No second is required for motions coming from Boards or committees.
4. Chair restates the motion.
5. Chair asks for discussion. Maker of the motion has the first right to speak and debate is limited to only the question at hand.
6. When debate is over, the Chair puts the question to a vote.
7. The vote is recorded: support, oppose, or abstain. The chair may be called upon to break a tie.
8. Chair states the result of the vote and directs action.

Motions should be relevant and decided on in a timely manner. Motions should not be used as a technique to distract or waste time. The chair has the discretion of asking for any motion to be submitted in writing before consideration. To make a comment, the speaker must be asked to be recognized, usually by raising their hand. The vice-chair will note down the order of speakers if multiple hands are raised and inform the chair who is next on the list. A speaker must wait to be recognized by the chair before making their comment.

Modifications to motions do not always need to be brought to the floor. Before the chair has restated the motion and debate has begun, a member can ask for the maker of the motion to modify it. After stating the modification, the maker will either accept or reject the modification, and debate may proceed. This also holds true for withdrawal of a motion.

The chair should refrain from voting on any question except where participation would affect the outcome (i.e., breaking a tie vote), so they can protect the chair's impartial position.

Fundraising

Establishing and maintaining ample funds can be one of the most challenging components affiliate chapters face. Membership dues are not typically enough to do more than fund the newsletter available to the affiliate chapter members. After all, training, mentoring programs, conference fees, and display booths cost money the affiliate chapter may not have. These funds are often raised through fundraising efforts. This section will address a couple of common fundraising approaches.

The first approach to fundraising is consideration of fundraising activities. This approach requires a creative and flexible mind. Typical activities range from selling merchandise (such as pins or other goods), conducting silent auctions, gala events, crowdsourcing, comedy shows, and raffle tickets. The sky's the limit. No idea is too corny to raise funds using this approach.

Second fundraising approach is directly asking people or companies for money. Many companies enjoy contributing to non-profit organizations or events. A direct ask is often the most effective way to raise funds. Many affiliate chapters use “The Ask” when seeking donations to state or regional conferences.

In using “The Ask” approach, affiliate chapters must develop a clear case for the money request. Share the story of your project, clearly identifying:

1. Mission statement of your affiliate chapter
2. Goals of the project
3. Anticipated results of the project
4. Benefit to the community (tell the community’s story and how the project’s success will impact the community)
5. Benefit to the company donating the funds (something tangible like advertisement space or intangible like the intrinsic reward earned by supporting others)

This information can be shared in a traditional letter or a flyer. Include information that makes it easy for a donor to send money. Add a pre-addressed form they can mail in, a website address to donate online, and any other information. The process of donation should be made as easy as possible.

Follow up on the original ask via a phone call or email to the potential funder. Many companies are willing to donate, but just need a gentle reminder of your interest. For any donations received, ensure that a thank you note is sent. This thank you letter becomes the donor's document to qualify for a tax deduction. Be sure to include your organization's name, the fact that the organization holds non-profit status, and the amount (or if an item was donated, a description of the item *without* an estimated worth). You may want to include a comment on how the money was used or the results of the program. Use these thank you cards as an opportunity to develop a relationship with the company. If a potential donor does not fund your program, kindly thank them for their consideration. Consider sending them a brief message about the result of the project or future projects. They may be willing to be involved in other projects.

Grant Writing

The final approach to fundraising is grant writing. Writing a grant may seem like the easiest approach to getting the money the affiliate chapter needs to run a project; however, it is the most challenging, competitive, and time consuming. If the resources are available to commit to writing an effective grant, it can also be the most lucrative. For more information about how to write a grant, please visit the Appalachian Regional Commission's [website](#).

Affiliate Chapter Officers

Every affiliate chapter is unique with varying board structures and individual responsibilities, but all require a great deal of commitment. Holding a board position requires an individual to dedicate time weekly or monthly to the organization. Acceptance of such a position should be done with a great deal of consideration. Board duties often require teamwork and strong

interpersonal skills. For information on creating an effective team, review the [Team Building](#) document.

Time Commitment

An officer typically spends 2-10 hours a week on affiliate chapter duties. These hours can include corresponding with affiliate chapter board members and committees. In addition to organizational communications and activities, inquiries from the general population are common. For example, chapter members, agencies, local organizations, political offices, hospitals, law enforcement, etc. may contact you for general information, local interpreter contact lists, referrals, or accessibility information.

Affiliate chapter officers with specific time-related responsibilities will have heavier workloads at different times of the year. For example, the treasurer and/or membership chair can expect near the end of a fiscal year or membership renewal cycle. The recording secretary will be busy after a board meeting preparing minutes. The communications committee allocates a tremendous amount of time collecting articles and designing the next newsletter. The president plans the meeting agendas and may receive a large percentage of the communications from the members.

Officers may also be called upon to represent the affiliate chapter in meetings of various boards and commissions relating to interpreting issues across the state. Officers may travel to town halls or interpreter training programs to present information about the organization. If these events require board members to take off of work, consider budgeting for a loss of work stipend to the board. Small steps like these support the success of the organization and reduce the risk of burnout by alleviating potential financial stress caused by volunteer duties.

Officers may be asked to represent their affiliate chapter at local, state, regional and/or national conferences. RID hosts a biennial conference on odd numbered years with the individual regions holding regional conferences during even numbered years. Depending on the financial strength of the affiliate chapter, funding may be provided in whole or part for

chapter board members to attend the conference and in return, share beneficial information with the other officers and/or membership.

Holding an office in a RID affiliate chapter is an honorable way to contribute to the profession of interpreting. It is also one of the best ways for keeping abreast of current trends and issues in the field as well as developing national level resources and lifelong friendships. The decision to run for and ultimately accept a position on an affiliate chapter board should not be done in haste. Carefully consider the time commitment involved and the effect it will have on one's professional and personal life. A healthy chapter is one in which the entire board shares the workload and can depend on each other for support. Although the work of a board member in a RID affiliate chapter is time consuming, it is also educational and extremely rewarding.

Board Meetings

Depending on the structure of the affiliate chapter, board members may meet monthly, bi-monthly, or quarterly. These meetings may require extensive travel in rural areas and costs can be incurred. If possible, the chapter may reimburse these costs or provide a per diem for attending members. Many affiliate chapters are not able to provide travel or per diem expenses for board members but, because board business is related to their field of work, many board members use the related expenses as tax deductions.

Technology has made participation in board/committee meetings easier. Many affiliate chapters take advantage of video conferencing. This is especially beneficial for those chapters where traffic or traveling long distances can become prohibitive. While video conferencing is wonderfully convenient, it should not entirely take the place of face to face board meetings. Schedule face to face board meetings regularly or consolidate face to face meetings into annual or semi-annual board retreats. Remember to add the predicted expense of these meetings into the affiliate chapter budget.

Committees

Every community has unique needs and often the committees in an affiliate chapter reflect those needs. The guidelines in this section are suggestions and may be altered to fit the needs of the local community.

Each committee should have a minimum of 3 voting members who will serve for a set amount of time. These committee members are appointed by the chapter president, or in compliance with the bylaws. A board member is appointed to serve as the liaison between the committee and the board. Committees are tasked with a specific scope of work as developed by the board or by member motions. Using committees can streamline the workload of the board, making it more efficient and effective.

Standing Committees

Standing committees are permanent committees that meet regularly. These can include, but are not limited to, the following:

Advocacy Committee for networking and communication between the organization and those not familiar with the interpreting profession. This committee is also responsible for the advocacy of the rights of interpreters and Deaf, Hard of Hearing, and DeafBlind individuals.

Bylaws Committee for recommending bylaws changes and to assure that the current bylaws are adhered to.

Communications Committee for publishing the organization's newsletter, announcements, website, and social media pages.

Certification Maintenance Program (CMP) Committee for keeping abreast of the RID CMP standards and, if approved by RID, for awarding CEUs to chapter members and sponsoring local events.

Diversity Committee – for recruiting diverse representation within the affiliate chapter board and committees, and educating and advising the board, committees, and community on issues of inclusion.

Fundraising Committee for generating financial support for the organization's activities.

Legislative Committee for keeping abreast of and affecting possible legislation affecting the field of interpreting.

Membership Committee for the recruitment and orientation of new chapter members, plus the maintenance of membership lists.

Nominations Committee for generating lists of names of members who are willing and interested in serving on the various committees and other elected capacities within the chapter.

Professional Development Committee for planning and hosting workshops, state conferences, and other professional development activities.

Professional Standards Committee for preventing potential grievances by educating the community about RID, the Code of Professional Conduct, and the interpreting profession as well as serving as a resource for interpreters concerning situations that could cause conflict and grievances.

Scholarship Committee for developing guidelines of the scholarship programs, raising money for scholarships and awarding scholarships. With the increasing costs of certification, this committee is integral part of the affiliate chapters by providing scholarships for partial or full support of the testing fees.

Strategic Planning Committee for developing long-range goals and objectives for the organization.

Ad Hoc Committees

The affiliate chapter, from time to time, can establish ad hoc committees or a taskforce for the purpose of targeting specific issues in a timely fashion. These committees are given specific tasks with guidelines and a deadline for completing assigned work.

Appointments

Calls for committee service and scope of work for chairs and committee members may be published in the affiliate chapter newsletter, social media pages, and/or emailed to the members. Decisions for selection and appointment may consider several factors including, but not limited to:

- The particular committee's scope of work
- History of affiliate chapter involvement
- Personal skills and expertise
- Cultural diversity

Each committee chair, member, and affiliate chapter board liaison serves at the pleasure of the president and the affiliate chapter board and responds to goals and objectives mandated by the membership or the board.

Roles and Responsibilities

Chair

Chairs are responsible for filing reports on a regular basis to their affiliate chapter board. Reports identify the committee's charge, outline established timelines, and report progress. Additional responsibilities include submitting reports for the affiliate chapter newsletter, working with the affiliate chapter board liaisons, keeping within the committee budget, arranging for and presiding over committee meetings and tasks, and responding to issues in a timely manner.

Affiliate Chapter Board Liaison

The affiliate chapter board liaison is an ex-officio member of the committee appointed by the president. Responsibilities of the affiliate chapter board liaison include serving as an intermediary between the board of directors and the committee, encouraging and monitoring the timely completion of committee charges and issues, bringing committee

recommendations to the board, and, when appropriate, making motions based on committee recommendations.

Committee Membership

Each member of a committee must be a voting member in good standing of the affiliate chapter and appointed by the president. Ad hoc committee/taskforce membership is also limited to voting members, or the requirements of the chapter's bylaws.

Scope of Work

The affiliate chapter board informs each committee of their scope of work based on the needs of the chapter and membership. Each committee should in turn articulate committee goals, budget requests, and timelines and submit these to the affiliate chapter board for approval annually or as requested. From time to time, additional responsibilities may be assigned to committees and will be communicated by the affiliate chapter board to the committee chairs. Changes to the scope of work should be documented and agreed upon by the committee.

Meeting Notification

Notification of open committee meetings with a tentative agenda should be shared with the membership 30 days prior to the meeting. The affiliate chapter board liaison should be involved in the setting of dates as well as the agenda. Meetings should be scheduled at times when a majority of committee members may attend. For open meetings held through a video conferencing platform, the meeting link should be shared with the membership. Not all committees will choose to have open meetings; instead, their committee reports can be shared in the chapter newsletter to keep members informed on the committee's progress.

Budget

Committees should work with the affiliate chapter board liaison to determine budget needs. Funds are administered by the affiliate chapter treasurer. Budgets and funds requests should be submitted to the affiliate chapter board for review on an annual basis or as needed. It is

strongly suggested that each affiliate chapter have a [reimbursement policy and standard forms](#) for board and committee expenses.

KEEPING LEADERSHIP ALIVE AND WELL

Imagine... an RID affiliate chapter where board and committee positions are easy to fill and where leadership transitions are smooth and communicated well. Imagine connecting with people who want to serve their professional organization now and in the future, and imagine if each person had a personal plan for leadership growth. Imagine the benefits to the community and organization if leadership onboarding included skill building, mentorship, and training given by those with leadership experience.

Leaders are not born, they are made. For this reason, the mantra of organizational leadership should be "**plan ahead, train behind**." Leadership decisions and choices should be made through positive processes and supported by specific information, training, and role models. A prospective leader should have access to all of these resources long before an individual accepts the nomination to run for a position. Every person who supports the profession, from the chapter president to committee members to the student representative, has taken on a leadership role, whether they recognize it or not. Intentionally nurturing the next generation of leadership on all levels should be a continual part of every leader's responsibility.

Honor Commitments

Make sure that everyone, including board members and the general membership, understands the commitment to RID, to the affiliate chapter, to the members, and to the Deaf community. Review and demonstrate the chapter values regularly, incorporating them personally and professionally. Appreciate the people who do give of their time and energy to support the profession. Hold them to their commitments and provide them tools and resources to complete their commitments successfully. If the board notices an individual or committee struggling with their scope of work, reach out and have an open conversation

about the situation. Listen without judgement to all sides and collaborate on an action plan to assist moving forward.

It may happen that someone wants to commit or has committed, yet life throws a curveball and the person is not able to continue their commitment. Or perhaps a member volunteered for a role and later discovers the role is not the right fit. If this occurs, the member should immediately communicate their concerns to the board. If necessary, the board and member can develop a timeline for stepping down from the position. These transitions can be difficult and often emotional. Keep lines of communication open, stay gracious and professional, and keep the success of the organization at the forefront.

Consider having candidates run as a slate of officers rather than individuals running for a single position. Individuals going into an unknown position will find comfort in a familiar ally running alongside them, reinforcing their commitment towards a mutual goal. Groups of like-minded individuals can create a powerful force.

For board or committee members that are less familiar with each other, take the necessary time to get to know each other on a personal level. Understand differences, share stories, laugh and play together. Recognize the shared commitment that brings the group together. Warmly welcome new inductees and celebrate the completion of terms. Commit to fostering a positive environment to play and work. While on the surface, bonding activities may seem like a distraction from the work at hand, but in reality these activities strengthen shared commitment and create a stronger working force. Teams that play well together will work well together, becoming more productive than teams who focus solely on work.

Scope of Work

Provide a clear scope of work for each board position and for each committee. If needed, encourage development of bylaws or policy and procedure manual sections that includes all scopes of work. The board or members may have expectations about the scope of work that

are not shared by all. Clear descriptions promote more objectivity about what is required for specific positions within the organization.

Stagger board position terms to ensure there are always experienced board and committee members serving. Incoming leaders will learn the history, protocol, and the collective wisdom from those in other positions. Later, the new people will become seasoned board and committee members who will provide the same training to future members.

Make sure that the work is distributed fairly. It is crucial that leaders understand the power of delegating. Leaders are elected to oversee the work of the organization, not to do all the work of the organization. Recognize that overseeing is time consuming and actively

delegate and distribute responsibilities among the board, committees, and volunteers accordingly. A leader does NOT mean simultaneously being the acrobat on the flying trapeze, the lion tamer, the clown, and the flame thrower. Rather, a leader is more like the circus master who makes sure that all the acts are progressing smoothly in all arenas.

Past President and President-Elect Positions

Consider adding a past president position and/or a president-elect position on the board.

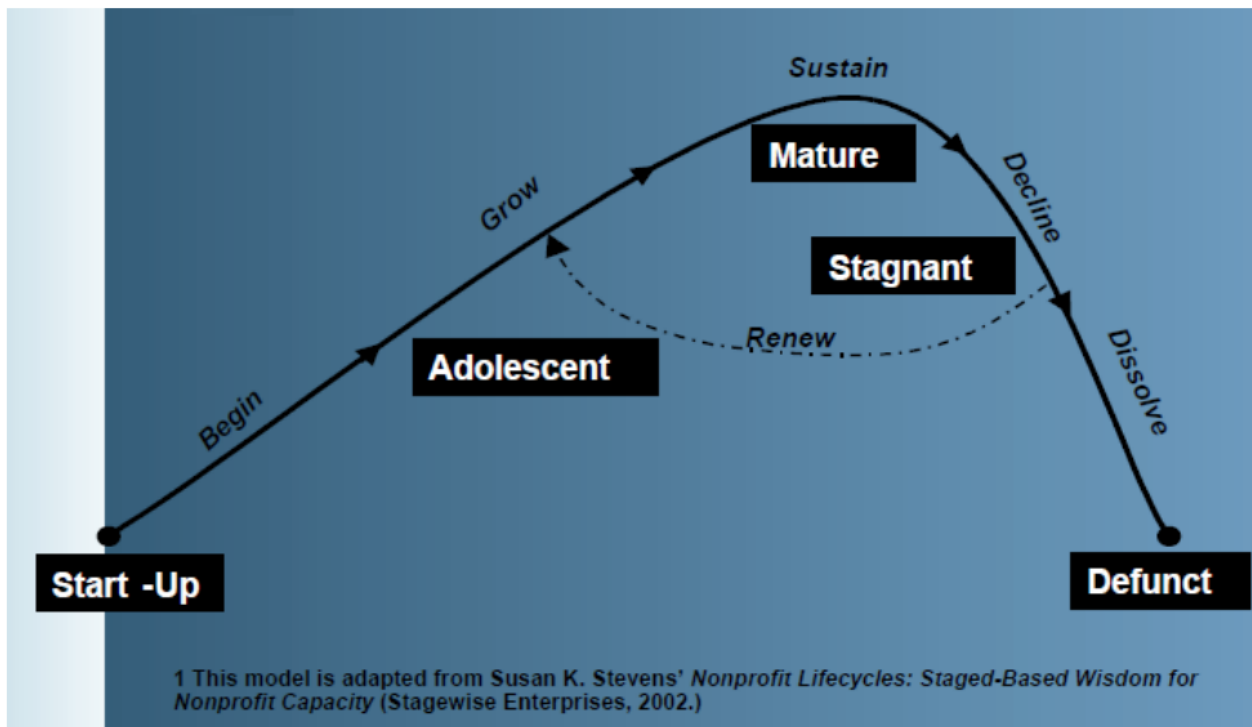
President-elect positions allow for a term of office whereby the next president can learn under the current president. This assures the organization of a smooth transition and supports the incoming president with time and experience before assuming the new role. A past president position allows incoming boards the benefit of the wisdom and experience of outgoing leaders. Each position takes away some fear and uncertainty involved in stepping into leadership positions.

Organization Lifecycles

Organizations are like people. They often go through several different stages from the start-up to growing to the mature stage, and sometimes to stagnation or decline. Just like people, organizations rarely do this in a neat, orderly, and predictable fashion. Organizations may be at the start-up stage in some aspects and growing in another. Similarly,

organizations may be solidly in the growth stage until they face a crisis or a major change in leadership that serves as a catalyst for either moving them backwards to the startup stage or catapulting them forward to the maturity stage. The stagnant stage can lead to a decline or a renewal within the organization, depending on how the organization responds to the stagnation. Often, an initial decline forces the organization to reevaluate traditions and assess current needs of the organization and community. If done well, this period of uncertainty can lead to a sense of renewed energy and purpose, revitalizing the organization.

Stages of Nonprofit Organizational Lifecycle



Remember that activity within each of these stages will ebb and flow. This is a natural pattern and usually does not necessarily indicate an organizational decline. Sometimes a community's attention will turn towards another cause, resulting in some positions left temporarily unfilled. Other times, circumstances may result in members taking a step back from community engagement. If you feel the organization stagnating, assess the surrounding circumstances. Ask members what they need from the organization and adjust accordingly. Remember that leadership is a learned skill; people must allow new leaders to learn and make mistakes. These mistakes or failures become the best teachers. If people feel something can be done better, encourage them to run for a leadership position. A person

may run in hopes of impacting a certain issue or implementing a specific change, which can bring a new burst of energy to the committee or board.

Leadership Mentoring

Approach former leaders to mentor the incoming leaders. One-on-one mentorship should be provided to anyone who is interested in possibly running for an affiliate chapter office. Do this privately and confidentially until the person being mentored has decided to publicly announce their candidacy. This gives that individual time to see what the position is about, and to learn more about the requirements in private. All too often, when someone mentions a person *might* be interested, all other potential candidates step back leaving that individual feeling pressured into the position. Possible candidates should have a way to check out the position privately and still turn down the position without public comment.

Provide regular leadership training for the board, committee members, and potential leaders. It does not have to be fancy. Leadership training provides a way for outgoing board or committee members to share their work and views with incoming board or committee members. Consider training on general intra- and interpersonal skills, along with ethics, diversity training, and decision-making models. These topics support leadership development, making an individual more confident when taking on a new role and promoting member trust in the person's ability to lead.

Develop resources (documents or personnel) within your chapter who can lead groups in exploring and developing leadership styles. Resources can help the group address questions such as: What is the purpose of a board? What are individual and collective strengths? What is the board's decision-making style? Check with former presidents, capitalizing on their wealth of experience and information. Also check the internet for materials on leadership and nonprofit boards. Review the [Team Building](#) document and the [Tools and Strategies for Conflict Management](#) for additional ideas.

Be Member Driven

One of the abiding principles underlying RID at the national and affiliate levels is that RID is *membership* driven, not *leadership* driven. This organization is made up of professionals who volunteer their time for the betterment of a profession. RID strives to advocate for best practices in interpreting, professional development, and for the highest standards in the provision of interpreting services. This can only happen by working as a unified whole. The national and local organizations provide the structure or "bones." Members provide the heart, muscles, ligaments, and connective tissue that create the vision, bind people together, and provide the power to get things done. Without the members, a chapter is only a skeleton, unable to move or function on its own.

An organization that does not move forward will become stagnant and die. An organization can only move forward through the dedication and commitment of its members volunteering to take on tasks large or small. Everyone must understand that electing leaders does not relieve the membership of its responsibility or call to action. Everyone has a part, everyone is needed, and everyone is important.

Let the membership know what is expected of them. What expectations does the affiliate chapter have for members? Possible expectations may be to attend membership meetings, vote in elections and on motions, participate in workshops, serve on a committee, help with refreshments, submit items for the newsletters, etc. Other expectations, which may not be readily known but are equally important, include providing accurate information and feedback to the members and leaders, supporting leaders' efforts to affect positive change, respectfully challenging flawed plans or strategies, and providing individual expertise to the group.

When planning workshops for CMP or ACET programs, consider workshops that address specific needs of members who are considering future leadership positions. Use forums, meetings, or group surveys to assess what skills people need before they feel ready to serve. Some areas to consider are:

- **Basic Leadership Orientation** - responsibilities of boards and committees, association management principles, leadership styles and characteristics, team building, report writing, and goal setting.
- **Leadership Skill Development** - conflict management, mediation models, time management, presentation skills, public speaking techniques, interpersonal skills development, motivation techniques, marketing strategies, strategic planning, group dynamics, decision-making models, leadership plan development, etc.
- **Logistics Information** - organizational structure, policies and procedures, scopes of work, national office structure and staff, fundraising, parliamentary procedure, budgeting, record keeping and minutes, bylaws, products and publications, etc.

Keep Seasoned Member Active

Keeping seasoned members active in the organization is not significantly different from attracting new members. The key is to highlight the reasons members joined the organization, and to show members that their involvement is unique and makes a positive difference. Remember, too, that people respond best to personal invitations.

The pros of working with seasoned members is the history, experience, and wisdom they bring to the organization. They often have experience on all levels (state, regional, national). The downside is that seasoned members might be burned out. They may feel tired of the same old, same old. Or they may feel underappreciated or insecure about being outdated in a rapidly changing field.

Some ideas on how to attract (and attract back) chapter members include:

- Provide periodic and regular chapter vision and goal setting activities. What do the members want to see happen?
- Provide personal invitations to get involved. People respond most to one-on-one invitations and personal training sessions geared to meet their unique needs.

- Provide safe settings. Develop ground rules and actively cultivate mutual respect.
- Give members with limited experience something simple to do at first; ask seasoned members to share their wisdom and experience.
- Be informal and personable; use people's first names; be generous with positive suggestions and compliments.
- Take the time to explain new jargon or models of the profession, providing seasoned members a judgement-free zone to keep up with the changes in our field.
- Divide work into many manageable parts with clear timelines before asking for volunteers; make sure work responsibilities are equitable and that most of the work is not being done by only a few. Check in often to make sure people are not overwhelmed.
- Help members find things to do that match their interests and talents.

Show Appreciation Often

One certain truth for any organization is that people will appreciate individuals who step forward to serve an organization...however, few will ever say so. Therefore, it is important to take the time to thank, praise, recognize, and appreciate the work that so many do for the organization. Appreciation should occur both formally and informally and, most importantly, it should occur often.

Remember that the board, committees, and general members are volunteers who chose to dedicate their time and energy to our profession through our organization. It can be easy to judge our leaders or expect a lot from them, but it's vital to recognize that these individuals have stepped forward to volunteer their time to serve the community. This always comes at a cost whether it is time away from work, family, friends, or precious rest. Our leaders are deserving of respect and appreciation, for they have chosen to work for the future, to contribute to the betterment of the profession, and to become an example for those new professionals entering the field.

Since monetary reward for professional service is neither sought nor available, volunteer experience needs to be fulfilling and rewarding. One way to encourage this is to develop a

culture of appreciation. It sounds easy, but it is something that is frequently overlooked. Here are some ways that affiliate chapters can thank those who serve:

- Pass a motion dismissing a taskforce or committee with thanks once the group has finished the scope of work
- Regular service awards, gifts, and certificates of appreciation for volunteer leaders presented during an important event such as a conference banquet
- Public "thank you" during membership meetings
- Letters of thanks to those who agree to serve, and again when service is completed
- Member bio highlights in affiliate chapter newsletters and NAD state association newsletters
- Nomination of outstanding members for chapter, regional, and national awards and scholarships
- Reduction in membership dues, workshops fees, etc.
- Standing ovations and lots of applause
- Hand written, personal notes to let individuals know how much their service, leadership, etc. has meant to you

Remember that the thanks should be given both publicly and privately. Public thanks should be eloquent, heartfelt, and done at a joyous occasion. Private thanks should be personal and sincere. No one can ever be thanked enough.

Reduce Burnout

OK, what if you've tried to prevent burnout, but it happens anyway? Here are some suggestions for handling burnout:

- Carve out time in your schedule for yourself. Step away from email and meetings and find an activity that clears your mind for a minute, an hour, or a weekend - whatever you need.

- Check your health - physical, and mental. Often when we are burnt out, we've been ignoring our body and our emotions. Give all aspects of yourself some attention.
- Take a step back and evaluate the whole picture. Focus on the forest instead of the individual trees.
- Talk with your mentor! Everyone should have a mentor and everyone should become a mentor at some time in their career. Cultivate supportive mentorships.
- Spend time on your personal relationships. Often, professional burnout is compounded by strained relationships at home. Reconnect with your loved ones.
- Evaluate your options and determine a plan to move forward.
- Find something that inspires you! A sense of curiosity brings about inspiration and new energy. Therefore, the opposite of burnout is inspiration. Search for personal or professional inspiration.
- Remember to laugh and play in your personal life as well as within the organization. Most likely, if you feel burnt out, so do others around you. Plan a fun outing, play games, share funny stories.
- Prepare for change in leadership. Plan Ahead, Train Behind. Don't feel that the organization's success is all on your shoulders. Train up the next generation to lead in your place.

Planning a Retreat

It's that time of year again...time to plan the annual retreat. Or perhaps this is the first time someone has proposed a retreat. Or perhaps it is a tradition that was forgotten and is now being resurrected. Whatever the reason or whoever suggested it, this section will help make the planning easier and remind you of important details. For additional considerations, see the [Retreat Considerations](#) and [Team Building](#) documents.

At Least Three Months Before

The first thing that needs to be done is establishing a **planning committee**. This can be the board, general members, or a combined group. The most important component is that those involved are interested, willing to work hard, and excited about planning a retreat.

First, the committee determines the purpose of the retreat. Some chapters may want a small, focused board retreat. This retreat could concentrate on specific tasks or build a sense of teamwork or both. Other times, an AC might want a retreat that includes the membership to reenergize the community. Other retreats aim to provide a getaway for ‘brave spaces’, discussing sensitive issues or offering diversity or multicultural communication training. Once the goal is decided it will be easier to plan the rest of the retreat. Make sure you refer to the purpose of the retreat throughout the planning sessions, so you can see if you have drifted away from the goal or stayed on course.

Shortly thereafter a budget needs to be devised for the retreat along with a location and length of the retreat. Consider whether or not participants will pay, if CEUs will be offered, and if meals will be offered. Decisions about number of participants, deadlines, and a refund policy should also be determined at this time. Once these things have been decided, delegate tasks, forming subcommittees if necessary, and tackle each part of the retreat as a separate venture, coming together regularly to make sure all parts form a whole. Send out save the date notices to potential participants.

Two Months Before

Next, determine the format and develop an agenda for the retreat. Contact any outside resources if needed (presenters, facilitators, entertainment. etc.) and engage their services. Don’t forget to look at your membership base and see if there are any resources you can use. Make sure to leave time in your agenda for informal social interaction. If hiring a facilitator, give them a tentative schedule, topics, and specific expectations early on so they have time to prepare. If requesting CEUs, have all paperwork for the presentation submitted to the CMP sponsor at least two months before the event date.

One Month Before

Finalize the agenda by confirming with each presenter or facilitator. Find out what audio/video or printing needs each presenter has for each session. Confirm with the retreat site about meal choices, dietary restrictions, rooms, accommodations, and technical

equipment. Prepare any welcome packets including copies of the final agenda, participant lists, and any other general materials. Arrange for retreat volunteer staff to handle logistics during the retreat itself (check-in, moderating presentations, meal coordination, taking pictures, etc.).

During the Retreat

Educate all participants on the goals of the retreat and collectively create ground rules for your time together. The coordinator or facilitator will keep the retreat on schedule but recognize that the group needs are fluid. The group may vote to alter the schedule, allowing for deeper discussions or longer breaks as needed. Oftentimes intense or unexpected emotions can arise during a retreat. It can be tricky balancing individual needs with the group expectations. Encourage respectful, culturally sensitive communication. Retreats can often feel like a vacation or even group therapy, but keep in mind that the ultimate purpose of the retreat is for the betterment of the organization and community.

After the Retreat

At the end of the retreat, provide an evaluation form so the participants can share their experience with the planning committee. Have the committee meet after the retreat to review what went right and what should be done differently the next time around. The committee should type up a report to share with the board, including final attendee numbers, what the weekend included, and the final budget. Share the experience with the membership in the next newsletter or in a social media post.

SERVING THE MEMBERS

Accessibility

Accessibility is about equity. Equal access is making sure that everyone has an opportunity to understand and fully participate in any event or activity. This can look different for every individual, meaning equality is not equal across the board. Focus on creating an equitable environment that meets individual needs. The majority of people in our profession are able-bodied, hearing people. Given that this demographic often does not personally experience inequities on a regular basis, they may have less awareness of injustice or inequity. This does not make them uncaring, simply unaware. Regular education, resources, and a diverse team can support an affiliate chapter's goal of equity and accessibility for all.

How often are Deaf affiliate chapter members included on a planning or coordinating team? How inclusive is your membership of diversity? Do you actively recruit and support members of all backgrounds? Having diversity on executive boards and affiliate chapter committees enriches the dynamics and content of the various groups. The groups can then provide a balanced and fair representation of the people with whom we work and honors the diversity of the community.

Equality



The assumption is that **everyone benefits from the same supports**. This is equal treatment.

Equity



Everyone gets the supports they need (this is the concept of “affirmative action”), thus producing equity.

Justice



All 3 can see the game without supports or accommodations because **the cause(s) of the inequity was addressed**. The systemic barrier has been removed.

Language

Equity is demonstrated in the language that we use, whether that be our everyday language or a language policy at an organization’s event. When discussing people, use people-first terminology, such as ‘person with a disability’, and ‘person using a wheelchair’. When in doubt of a person’s gender or identity, ask their preferred language or pronoun, and respect their personal choice.

For any event, workshop or conference, use a shared language that everyone has direct access. In our field, this is often American Sign Language (ASL). At any event where there are Deaf people present, everyone should be encouraged to use ASL, providing interpreters, FM systems, or Pro-tactile ASL for people who are not able to access ASL directly.

Hidden Disabilities

Many people live with disabilities that go unnoticed and therefore unaccommodated.

Examples of such disabilities include:

- Scent and/or environmental chemical allergies and sensitivity
- Cognitive developmental delays or disorders
- Epilepsy
- Mental Health illnesses
- Chronic diseases or health issues

A lack of consideration for these hidden disabilities can range from something minor with short-term effects to extremely serious results. Provide a safe space for members and participants to request accommodations privately. Keep the information confidential and work towards providing an equitable solution.

Logistics

Consider the physical and logistical aspects of your events. Are they accessible?

- Are your meetings or events held in buildings with steps but no ramps or elevators?
- Are the doors, rooms, aisles, and bathrooms large enough to accommodate scooters and wheelchairs?
- Are there accessible parking spaces wide enough to accommodate a van with a lift?
- Do fire and emergency alarms have both visible signals?
- Are there interpreters provided?
- Are meeting tables, microphones, and any food tables accessible to a person using a wheelchair, scooter, crutches, or cane?
- If a DeafBlind person is expected, are there materials in Braille or large print, and have the appropriate Service Support Providers (SSPs) and interpreters been scheduled?
- If someone arrives with excessive perfume or cologne, is someone prepared to ask the person to leave or sit farther away?

This is by no means an exhaustive list. It is merely a beginning with which to start. RID's national office has developed a broad [checklist for accessibility](#) purposes for overnight,

weekend, and conference travel. This checklist is based on minimum accommodations required at events and may not meet the specific individual needs of your participants. If you are planning an event and are not sure of what is considered accessible and inclusive, you can contact your local Office for Persons with Disabilities for advice. Reach out to the person requesting the accommodation directly. Having a person with a disability review the event site would also be advisable. After all, they are the expert on what accommodations work best for them.

Many of these considerations may seem minor, but for someone with a disability, the little things, especially language use, logistics, and the attitudes of the organizers, staff, and volunteers make a big difference. Embrace the spirit of inclusion. It's the difference between feeling like an inconvenience and feeling welcome.

Diverse Membership

Recruitment is the life-blood of the organization. Members financially and actively support the events and programs of the chapter. Every officer and member must make recruitment a goal. As individuals are recruiting, it is important to reach out to diverse communities and cultures. A diverse membership strengthens the affiliate chapter as well as the individual members. As we learn from each other, we grow from our newfound knowledge.

Affiliate chapters can increase their diverse membership through a variety of approaches. Here are just a few:

- Exchange organizational membership lists with the local chapters of diversity related organizations (Deaf and interpreting related) and/or local community organizations such as National Alliance of Black Interpreters (NAOBI), National Black Deaf Advocates (NBDA), Council de Manos (C5), National Asian Deaf Caucus (NADC), Interpreters/Translitterators of Color (ITOC).
- Contact RID Membership Services to obtain a list of RID members belonging to underrepresented groups in your area.

- Print the benefits of membership on a flyer, making it easy to share with the prospective members.
- Create an organizational involvement form as a tool to help identify diverse members' interests and to capitalize on their skills.
- Host an annual membership drive with incentives to promote and recruit diversity within the organization (prizes, drawings, membership discount, etc.).
- Co-host an event or workshop with a local diversity related group/organization.
- Ask diverse members to visit the local interpreter training programs, high school ASL classes, and other diversity related organizations to talk about your organization.

To retain diversity within the affiliate chapter, a conscious effort must be made to meet the needs of those members. Tools to assist in retention are limitless. Some approaches an affiliate chapter may wish to consider are listed below.

- Establish a local special interest group or caucus.
- Host a pre-conference event for Interpreters and Translators of Color.
- Host a pre-conference event for all new members.
- Establish a buddy system to match new diverse members with more experienced members to help the new member feel comfortable.
- Affiliate chapter newsletters may be used for:
 - Featuring a diverse or new member.
 - Sharing personal testimonies/comments from other diverse members.
 - Having a column related to issues affecting people of color and/or diversity related topics.
- Provide training and seminars on inclusion, diversity, and oppression.
 - Solicit diverse members (established or new) as presenters.
 - Have diverse members get involved with the planning and provision of the training.
- Create a list of diverse speakers, interpreters & trainers to promote and hire.
- If your affiliate chapter has recruiting materials, make sure that underrepresented groups are featured in the material.

- Host a multicultural feast/event.

Diversity Statement

Consider developing and publishing a diversity statement to bring the organization's commitment to diversity to light. RID's diversity statement is below.

The Registry of Interpreters for the Deaf (RID) understands the necessity of multicultural awareness and sensitivity. Therefore, as an organization, we are committed to diversity both within the organization and within the profession of sign language interpreting.

Our commitment to diversity reflects and stems from our understanding of present and future needs of both our organization and the profession. We recognize that in order to provide the best service as the national certifying body among signed and spoken language interpreters, we must draw from the widest variety of society with regards to diversity in order to provide support, equality of treatment, and respect among interpreters within the RID organization.

Therefore, RID defines diversity as differences which are appreciated, sought, and shaped in the form of the following categories: gender identity or expression, racial identity, religious affiliation, sexual orientation, socioeconomic status, deaf or hard of hearing status, disability status, age, geographic locale (rural vs. urban), sign language interpreting experience, certification status and level, and language bases (e.g. those who are native to or have acquired ASL and English, those who utilize a signed system, among those using spoken or signed languages) within both the profession of sign language interpreting and the RID organization.

To that end, we strive for diversity in every area of RID and its Headquarters. We know that the differences that exist among people represent a 21st century population and provide for innumerable resources within the sign language interpreting field.

Putting the affiliate chapter's commitment to diversity in writing can be a powerful statement. At the end of the day, RID and affiliate chapters members strive to promote our profession and meet the needs of all members of the Deaf and hearing communities. This community is racially and culturally diverse, and it benefits all affiliate chapters to expand their membership and include everyone.

PASSING THE TORCH

One way for affiliate chapters to grow is to have a strong working relationship with interpreter training programs (ITP) located in their state/area. Affiliate chapters that wait until after students graduate to begin recruiting are missing out on a golden opportunity.

Listed below are some suggested activities to let students know about RID and the affiliate chapter:

- Contact ITPs and arrange for an officer to talk to the class; have membership information and event flyers to hand out. The more visuals the students have, the more successful your efforts will be.
- Hold an affiliate chapter meeting or workshop on the college campus; solicit students to handle the registration table or other duties.
- Offer a student rate for membership.
- Have a student column in the affiliate chapter newsletter.
- Have a student liaison on the board.
- Ask the ITP coordinator to share the chapter newsletter and events with the students.
- Work with the ITP coordinator and invite a student representative to observe an affiliate chapter board meeting. The affiliate chapter may reimburse the student for mileage and meals. In return, the student is expected to take information back and share it with the other students.
- Sponsor or host a graduation party annually for ITP graduates.
- Continue recruitment efforts once the students have graduated.
 - Send a congratulatory letter/card to each graduate.
 - Give each graduate a free year's membership to the affiliate chapter.
 - Assign a mentor to each graduate; personal contacts are always more successful than generic ones.
 - Host a special meeting for graduates and other potential new members.
 - Offer scholarships for pre-certified interpreters to attend workshops, conferences, and testing.

Mentorships

Many interpreters (and interpreting students) sense the need for mentors but find themselves at a loss on how to begin the search and enter into mentoring relationships. However, it is well documented that to succeed in this profession, mentoring and supervision practices are essential. To that end, we share a beneficial [mentorship manual](#) here, also found in the resource section at the end of this handbook. Also consider creating or contacting a local interpreting supervision group to encourage professional growth for members at all levels.

PROVIDING CEUs

Members see ACs as a resource concerning maintaining national certification and continuing education. Be familiar with the options RID members have for earning CEUs. The Certification Maintenance Program (CMP) began operation on July 1, 1994, and relies on RID approved sponsors to review and approve appropriate educational activities for participants. These activities can be group activities, such as workshops, classes, or conferences, or independent study activities, such as mentoring and self-study. Approved sponsors help maintain the integrity of the CMP and ensure that interpreters have ample and varied opportunities to learn, grow, and further develop their skills.

Affiliate Chapters often prefer having their own CMP sponsor who can provide Continuing Education Units (CEUs) processing to their organization and their members for free. Affiliate chapters are charged an annual fee to maintain their approved RID sponsor status, but this is often less expensive than paying a sponsor to approve each event hosted by the AC. If the chapter does not have an in-house CMP Sponsor, you can find a CMP sponsor by searching RID's database. Most sponsors will charge a fee. Shop around before committing to a sponsor and reach out to other Affiliate Chapters to see who they recommend.

A certified interpreter must earn eight CEUs (80 hours) in their four-year certification cycle. These eight CEUs are divided into two content areas: professional studies and general studies.⁴ At least six CEUs (60 hours) must be in the professional studies area. Interpreters holding specialty certificates must earn two CEUs (20 hours) within their field of specialization. These specialty CEUs are counted toward the six in professional studies.

⁴ Note: RID is currently in the process of implementing motion 2015.05, requiring all certified interpreters to complete 1.0 CEU of Power, Privilege, and Oppression (PPO) studies per cycle. The PPO CEU requirement is expected to launch on January 1, 2019. Please contact your region representative for updated information.

Professional Studies Includes:

- ASL Linguistics
- Deaf Culture
- Interpreting Theory
- Skill development
- Specialization (Legal, Deaf-Blind, Medical...)

General Studies includes:

- Human service
- Leadership
- General knowledge
- Community resources
- Business practices
- Teaching workshops

All CMP activities fall under four main categories: academic coursework, sponsor initiated activities, participant initiated activities (PINRAs), and independent study. For more information, please visit the RID's CMP page or contact cmp@rid.org.

Academic Coursework <i>Definition:</i> degree-earning courses at an accredited college (listed on the Council for Higher Education Accreditation's Web site www.chea.org/search) • Grade of A,B, C or Pass 1 quarter = 1 RID CEU 1 semester hour = 1.5 RID CEUs • CEUs are processed within the same CMP cycle in which the class was taken and completed. • Sponsor will provide and assist you with completing the Academic Coursework form.	Independent Study <i>Definition:</i> self-designed projects to develop skills or knowledge in a specific area (e.g., class or workshop development and presentation, mentor/mentee work, self-study class, literature review, etc.) • The activity MUST be pre-approved by an RID Approved Sponsor. Sponsor will provide and assist you with completing the Independent Study forms. • All requested paperwork must be submitted to the Sponsor so it can be processed and submitted to RID within 45 days after the end of the Independent Study. • Earn up to 2.0 CEUs per Independent Study. Must be completed within 12 months.
Sponsor Initiated Activities <i>Definition:</i> pre-approved RID Sponsored Activities (Advertising shows the RID CMP logo) • Attendee must sign the Activity Report Form with name and RID member number or submit CEU tracking sheet to get CEU credit. • Presenters may earn General Studies CEUs the first time they present a workshop once per CMP cycle (mark it on the Activity Report Form)	PINRA <i>Definition:</i> educational activities NOT offered by RID Approved Sponsors. (e.g., non-mandatory school district in-services, audited non-credit or continuing education classes, etc.) • The activity MUST be pre-approved by an RID Approved Sponsor. Sponsor will provide and assist you with completing the PINRA form. • All requested paperwork, such as proof of attendance, must be submitted to the Sponsor so it can be processed and submitted to RID within 45 days of the end of the activity.

COORDINATING WORKSHOPS

Hosting workshops are a common way to provide CEU opportunities. Most ACs choose to have a workshop committee take on the challenge of providing regular workshops.

Depending on your chapter, a committee size of 3-4 people is ideal. A larger committee can be difficult to keep tabs on causing additional work, while a committee with only one or two people can lead to burnout in committee members. Also consider partnering with the local chapter of NAD to share resources and information on events (See the [NAD RID State Cooperation](#) document).

Coordinating workshops can be broken down into three main sections: pre-event, on-site event, and post-event. There are logistical, financial, and access considerations. Planning and preparation are crucial for managing the many details that must be addressed to have a successful event.

Pre-event logistics

Determine the topic. What are the needs in your specific community? Send a survey out to members and local interpreters to see what areas they work in, what specialty certifications they hold, and what topics are they interested in. Consider the target audience and what members need to develop the next level of their skill and knowledge. The workshop committee should stay up to date on current trends and trainings in the field. Oftentimes members don't know what's happening on a national or international scale in the field of interpreting and trust the affiliate chapter to bring new methods and information to them.

Select the presenter. This may be done before the topic is selected or simultaneously. Sometimes the presenter will be determined by the topic. For example, an interpreter may request a specific subject, which is known to be taught by a particular person.

If a presenter is unknown to you, check with other interpreters or ACs to see if they know of this person's work and presentation style. Ask the person to send you a resume and a list of previously taught workshops. Presenters must have experience in their topic to be considered a qualified presenter and for the workshop to be approved for CEUs. The

presenters reflect on the affiliate chapter. Choose presenters who demonstrate ethical behavior in their work and within the community.

When selecting the date and times of your workshop, avoid conflicting with holidays, including school breaks when people are likely to travel. Be mindful of holidays celebrated by other cultures and belief systems. Research other events occurring within the ASL community to minimize any potential scheduling conflict. Consider seasonal factors such as snow, rain, or heat.

Another task is to determine the language of the presentation. Will it be taught in ASL or English? The coordinator, the presenter, or the audience may determine this. For example, if the workshop is open to both Deaf and hearing interpreters, the workshop should be taught in ASL. This demonstrates best practices and the chapter's commitment to equity and access. The language policy needs to be conveyed to the presenter and the audience in advance.

Funding

It is important to know the expenses and expected income of the event. If the workshop committee is unfamiliar with estimating expenses, contact an organization or agency that has coordinated past events. Some line items under expenses are set figures, such as the presenter or interpreter fees. Other expenses will require educated guesses, such as travel expenses, printing, or refreshment costs. It is always safer to estimate high and have fewer expenses at the end of the event rather than to estimate low and have outstanding bills.

The base fee for registration should be based on anticipated expenses minus the anticipated income from other sources divided by the number of participants. The committee will need to determine the 'break even' point so that if registration is lower than expected, or if anticipated funding from outside sources is lower than expected, the committee will know if they need to cancel or postpone the event. If workshops are poorly attended or often cancelled, revisit the community's needs. The number of workshops given in a year may need to be reduced or the venue or date may need to be moved to a more optimal time and

place. Ideally, workshops become a source of income for the AC. If that is not the case, revisit the workshop schedule and expenses.

If additional funds are needed, there are several sources of funding available for interpreting workshops. Possible sources include RSA regional grants, the Gallaudet University Regional Centers (GURC), Department of Vocational Rehabilitation, school districts, non-profit organizations and agencies, and businesses with Deaf employees. For a list of GURC sites, visit [Gallaudet University's website](#).

Some businesses or organizations may be willing to donate services or products rather than funds. These in-kind donations can be used toward refreshments, or as door prizes or raffle prizes. It is also possible for two or more organizations to set up simultaneous events at the same location and to publicize these events together to make them more cost effective.

Negotiating with the presenter

When booking a presenter, the coordinator will need to negotiate with the presenter about fees and expenses. Fees may be based on an hourly rate or on a flat rate. Some presenters have pre-determined fees so check with the selected presenter when making initial contact. Sometimes the coordinator of the event will have a predetermined budget in mind. Both the presenter and the coordinator have the right to negotiate on the fee. If an agreement cannot be reached, the coordinator may decide to select a different presenter. The first presenter should be thanked for their time and consideration; always leave the door open for future collaboration.

The presenter may need to be reimbursed for expenses such as transportation, lodging, meals, per diem, and miscellaneous expenses. Transportation expenses may include air transportation and/or ground transportation such as shuttles, rental cars, taxis, parking at the home airport, etc. Lodging may be provided at a hotel, conference center, or private home. Meals may be provided by the workshop or may need to be obtained on one's own.

Ask the presenter what their audio/visual needs are. Most likely they will be using a PowerPoint and in need of a laptop, projector, and screen. Miscellaneous expenses may include print costs for handouts. Flip charts, whiteboards, and markers are also commonly used by presenters.

The workshop coordinator should determine if the presenter needs to submit receipts for reimbursement of expenses, or if the sponsoring organization will be billed directly by the hotel, airline, etc.

Venue

The following settings can be considered when selecting a site: colleges, schools, retreat centers, community centers, agencies, hotels, hospital community rooms, etc. Find out if a location charges a fee for the space. Often, affiliate chapters can form a partnership with a local college and receive free rooms. If your membership covers a large area, seek partnerships with multiple locations. Hold workshops at each location at least once a year or as needed by your membership.

See the space before deciding if it will meet your needs. For workshops conducted in ASL, make sure that lighting is bright enough and that there are clear sight lines. Make sure the size and shape of the room are adequate. A long, narrow room may not work for some events. Check to see if there are any visual distractions in the room, such as striped wallpaper, patterned carpeting, or windows/backlighting. Make sure outlets are readily available and order extension cords needed for any equipment. Review the section on accessibility in this handbook.

CEU Approval

Workshops typically need to be approved a couple of months in advance to allow time for processing. See the “Providing CEUs” section in this handbook. Workshop descriptions and strong learning objectives (based on [Bloom’s Taxonomy verbs](#)) must be submitted along with the presenter’s bio and additional information. Contact your CMP sponsor directly for guidance through this process.

Advertising

Make sure the information is easily accessible and understandable. Make a flyer using a template from your preferred software. A PDF or JPEG version of the flyer can be easily posted on social media. For email blasts, software programs like Constant Contact work well.

The advertisements should include the following information:

- Dates
- Times
- Title of workshop
- Description of workshop
- Workshop objectives
- Presenter's name and a short bio
- Location, including name of the facility, address, and room number
- CEUs information (contact sponsor for specifics)
- Costs, including pre-registration and/or at-the-door prices
- Cancellation and [refund policy](#)
- Contact information
- Diversity statement
- Accessibility information and contact

In general, six weeks notice for most workshops is usually adequate. For workshops that are highly specialized or that are geared toward a specific audience, for example educators or legal interpreters, it may be helpful to send out “save the date” notices three to four months prior to the event so that participants have time to plan their schedules.

Registration

The sponsoring organization will need to determine acceptable forms of payment. Possible forms of payment include cash, checks, credit cards, and money transfers. Registration and

refund information should be included on the flyer. (See [example refund policy](#) found in the additional resources at the end of this handbook.)

Check with the AC board or the region representative to learn of any reciprocal agreements among chapters. For example, all affiliate chapters in RID Region V participate in a reciprocal agreement, allowing any Region V member to attend workshops within that region at the hosting affiliate chapter member rate, even if they are not a member of that specific affiliate chapter. If your chapter participates in a reciprocal agreement, be sure your registration system is equipped to handle this option.

Have an established, secure system for handling all incoming and outgoing funds. For advance payments, set up a system for checking people in at the door and verifying payment. If the workshop offers CEUs, the workshop activity form may double as a sign in sheet. Remember to collect RID member numbers for people requesting CEUs.

Registration tables, chairs and signs will need to be set up in advance so participants know where to sign in and/or register upon arrival. For large groups, it is helpful to have multiple points of registration, broken down alphabetically into smaller groups (for example: A-F, G-L, M-R, S-Z).

The workshop committee should determine if they will need extra assistance on-site, and if so, what kind. Volunteers can be recruited to help with registration and/or with room arrangement. ASL and/or interpreting students are often willing to assist at workshops so check with your local college or university to recruit volunteers. In some situations, it may be helpful to waive the registration fee for volunteers, particularly for students. If you use students to assist with registration, make sure the person handling on-site reservations is trustworthy, as they may be handling funds, both checks and cash.

During the Event

One committee member should be designated to make housekeeping announcements (for example, bathroom locations, smoking stations, CEU process, and parking) and to introduce

the presenter. Thank any sponsors, the workshop committee, volunteers, and any interpreters working the event.

Another committee member or volunteer will need to be available during the workshop for any needs that arrive. Be sure to have the phone number of tech support on hand to quickly address any equipment issues.

At the end of the event, evaluation forms (provided by the CMP sponsor or the presenter) must be distributed and then collected. The completed evaluation forms must be shared with the CMP sponsor and the presenter. The committee should also keep a record of the data, along with the workshop information, to inform the selection of future workshops.

Before closing the event, personally thank the presenter and verify the presenter has the correct contact information for invoice submission and expense reimbursement requests. Set a deadline for the expected invoice and subsequent payment to encourage closing the transaction soon after the event.

Interpreting Considerations

The planning committee members need to determine if interpreters will be hired for the event. This decision is often based on the language of the workshop, the presenter's preference, the target audience, and the purpose of the event. For example, if the workshop with a Deaf presenter is informational in nature and the target audience is pre-certified or emerging interpreters, then the committee may want to hire ASL to English interpreters. If the workshop with a Deaf presenter is on language skills development, the committee may decide not to hire interpreters. Information regarding the language of the event should be made clear on the flyer. Additional considerations include whether to hire a Deaf interpreter, or whether to hire interpreters for DeafBlind participants.

Best practices for hiring an interpreter, including pay rate, teaming, and providing preparation materials should always be followed. People look towards affiliate chapter as a role model for best practices. Assign one person on the committee to be responsible for

hiring the interpreters, negotiating fees and/or expenses, and being the point of contact. This person should also be responsible for drawing up contracts between the organization and the interpreter, securing signatures, and obtaining invoices from the interpreters after the event.

REGIONAL AND STATE CONFERENCES

Below are the recommended guidelines for hosting regional and state conferences with a link to additional resources. Whether the conference is at the chapter level, the state level, or the regional level, the planning process is similar. Many affiliate chapters have annual or biennial state conferences. State conferences are excellent for networking with others within the state, especially if there are large distances between major communities or if there are geographic barriers that prohibit accessible travel throughout the state.

Advantages for state conferences

- Local/state issues can be discussed in depth. This is particularly true if there is pending legislation that impacts the interpreting profession.
- Members from throughout the state provide each other support and networking opportunities. This is particularly helpful for members residing in remote areas.
- Encourages non-members working within the profession to join the organization.
- Provides several days of workshops in one location as opposed to other workshops being offered during the year.

Regional conferences are excellent for enhancing the cohesiveness of the profession within the region. Affiliate chapters interested in hosting a regional conference should contact the region representative. Regional conferences are funded by the region funds and/or affiliate chapter funds. The national RID organization assists in promotion of regional events but does not contribute funds or take part in coordinating regional conferences. Typically, the host of the regional conference will cover registration, hotel, and travel for one or two national board members to attend the regional event. RID headquarters may send a staff member, at RID's expense, to join in the conference. Appearances by the national board and/or headquarters' staff connect affiliate chapter officers and members with the national level of the organization and encourage networking and information exchange between all levels of the organization.

Advantages for Regional Conferences

- Located closer geographically to the members than the national conference and are thereby less expensive to attend
- Allows for a wide variety and higher caliber of workshops at regional conferences than the state conferences because of the larger financial base
- Focuses on regional and national issues
- May help RID, regional representatives, and AC board members to identify concerns and problems within the region
- Promotes collaboration between the ACs within the region

Guidelines for Regional Conferences

1. At least five RID affiliate chapters within the region must participate and approve the regional conference. A formal [profit/loss agreement](#) should be signed between participating chapters prior to the conference planning.
2. RID regional conferences may only be held during the years that there is no RID national conference. National conferences are held every two years on odd numbered years, therefore regional conferences are to be held on even numbered years.
3. The affiliate chapter presidents or their designees must serve on the regional conference planning committee.
4. The chairperson(s) serves as a liaison between the planning committee and the region representative and/or RID national office as needed.
5. The regional conference language must be ASL per membership motion C2015.03 which states that the official language of regional and national RID conferences be American Sign Language (ASL). ASL interpretation must be provided at regional and national RID conferences for workshops and presentations which focus on spoken languages.
6. Conference attendees are asked to use ASL at all times, demonstrating respect for consumers and our Deaf colleagues (See CPC tenets 4 and 5. As bilingual/trilingual professionals, using the common language of ASL in all public spaces of the conference makes all conversations equally accessible to everyone present.)

There is a shared folder of [Regional Conference Resources](#) containing an example budget, templates, information, and forms for regional conferences. These documents are view-only. To edit, copy the document into your Google Drive and edit your copy, leaving the original untouched. Contact your region representative for any additional information on previous regional conferences.

Timeline for Planning Regional Conferences

Planning a regional conference should begin a minimum of 12 months prior to the event although 18 months is recommended. The region's presidents' council should select conference chairs to coordinate the event. Once the chairs are selected, conference decisions will be made by these chairs, not the region representative or the presidents' council. However, the chairs should work closely with the region's ACs when selecting the date and location. Be sure to reach out to other regions as well as other regional and national and international organizations that may also be holding a conference. Avoid schedule conflicts as best as possible.

Many members of the host chapter should be enthusiastic about hosting the conference, especially at the regional and national levels. Many, many hours of 'people power' are required to plan and successfully host a conference. The more people who are involved and helping, the less likely individuals will be burned out by the time the conference convenes.

As mentioned above, the national headquarters is not financially involved with regional conferences. Since the region is not an organization in itself, merely a collection of affiliate chapters, it is not able to set up accounts or accept donations on behalf of the regional conference. One affiliate chapter in the region should be designated the hosting chapter. This chapter will be responsible for accepting donations under their non-profit status, accepting registration money, and paying presenters. Regional conference funds must be kept in a separate bank account from the affiliate chapter funds.

Ideally, the conference chair and/or the venue committee will be local to the hosting chapter. The conference chairs will be responsible for adhering to the conference planning timeline. A suggest timeline follows:

18-24 months prior

- Establish conference chairs
- Choose location and date
- Establish budget (contact regional representative for past data)
- Contact the region representative for conference seed money from the region's bank account (If no funds are available, ask each AC to contribute)
- Draw up a profit/loss agreement between participating ACs
- Secure hotel and sign hotel contracts
- Survey regional members for preferred workshop topics
- Open a bank account for the regional conference funds (done by the hosting chapter)

12 months prior

- Create website
- Flyers/brochures about the conference should include:
 - Dates
 - Host city
 - Hotel information
 - Web site address
 - Set prices and deadline for early bird registration
 - Registration information
 - Language policy stating ASL is the official language of the conference⁵
 - [Refund policy](#)
- Advertise at the regional caucus during the national conference
- Select committee chairs (see [suggested list of committees and descriptions](#))

⁵ **Motion C2015.03:** Move that the official language of Regional and National RID conferences be American Sign Language (ASL), and be it further moved that ASL interpretation will be provided at Regional and National RID conferences for workshops/presentations which focus on spoken languages, and be it further resolved that ASL as the official language begins with the 2016 Regional RID conferences. Motion passed by members in 2015.

9-12 months prior

- Call for vendor/exhibitors
- Call for sponsors
- Call for presenters
- Post tentative schedule (days and times)

6 months prior

- Open registration
- Call for volunteer staff support (local students or pre-certified interpreters)
- Call for interpreters (reach out to presenters or local interpreters)
- Post list of workshops and presenters

3 months prior

- Close early bird registration
- Post final schedule with times and days for each workshop with workshop description and presenter's bios.
- Advertise special events

2 months prior

- Close request for accommodations
- Prepare tentative hotel food order
- Prepare tentative AV order
- Close full registration refunds

1 month before the event

- Print signs
- Print program brochure and upload program on conference app
- Close all registration refunds
- Final walk through with hotel
- Finalize food and A/V order
- Final meeting with all committee chairs

- Print name badges (done the week before the event)
- Stuff conference bags (done the week before the event)

Post-event

- Pay hotel balance
- Pay presenters
- Pay interpreters
- Reimburse expenses ([example form](#))
- Collect evaluation data
- Thank you sponsors, donors, presenters, and volunteers
- Send report to hosting AC and share with president's council

THANK YOU

We understand how much you (AC volunteer leaders) give to your local organizations and the national organization. Without the tireless work that you do, RID would not be able to provide service at a national level. You are essential to the success of the national organization, the local organization, the interpreters in your area, and the Deaf community we all serve. Thank you for your work.

You are deeply appreciated.

ADDITIONAL RESOURCES

[Accessibility Checklist](#)

[Articles of Incorporation - Example](#)

[DeafBlind Connections Article](#)

[Liability Checklist](#)

[Mentorship Manual](#)

[NAD-RID State Cooperation](#)

[National Consortium of State Legislatures](#)

[Order of Business - Example](#)

[Refund Policy - Example](#)

[Regional Conference Shared Folder](#)

[Regional Conference Committees](#)

[Regional Conference Profit/Loss Agreement - Example](#)

[Reimbursement Policy and Form – Examples](#)

[Retreat Considerations](#)

[Team Building](#)

[Tools and Strategies for Conflict Management](#)