Managing Membership Applications: A Primer for Chapter Faculty Advisors

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Purpose & Contents

- This tutorial will help CFA’s manage the application process for new and renewing members

- Objectives for CFAs:
  - Learn about membership criteria and invitations
  - Learn the steps in processing memberships
  - Learn how to handle online memberships of new students
  - Understand how members renew their memberships
  - Learn how to transfer membership from one chapter to another
Criteria for CSI Membership

- CSI Bylaws specify criteria for students, faculty, and alumni members
  - csi-net.org/bylaws, Article 4
  - 4.1.1.1 They (students) shall have completed the equivalent of at least one full academic term (semester or quarter) of counseling courses carrying approved graduate credit as defined by the institution and are deemed promising for endorsement as a professional counselor whose ethical judgment and behavior will be exemplary.
Membership Processing Checklist

- csi-net.org/membership
  - Or csi-net.org/cfa
- What are the steps in membership processing?
- Who does what, and when?
- Who should you contact for help?
- Links to initiation planning and speakers
Invitation to CSI Membership

- CFAs must review GPA and evidence of excellence of potential new members
  - Applicants should
    - Have a GPA of 3.5 (on a 4.0 system)
    - Meet other professional membership criteria
      - see csi-net.org/bylaws
- Invitation must be in writing to each potential member
- Sample letter provided by CSI
  - csi-net.org/cfa
Membership Invitation Letter

- Sample letter includes membership criteria
  - GPA plus evidence of excellence
- CSI dues and any local dues are specified
  - Verify standard first year membership dues
  - Some chapters have local dues
- Letter will instruct students to complete application online
  - csi-net.org/membership
- Full-fledged membership occurs when the oath is taken at the initiation ceremony
Online Application

- New members will complete the online application
  - Applicants who paid by credit cards may be processed immediately
  - Applicants paying by cash/check will be processed on receipt of payment to CSI Headquarters
  - Chapters are responsible for sending one check to CSI for all members who pay by check
  - CSI does not process individual member checks
Verification of Applications

- CSI headquarters requires signature or email confirmation from the CFA approving all new members.
  - An email from CSI Headquarters containing information about individuals who have applied will be sent to the CFA weekly
  - The CFA will review the applicants, verify information, and reply back to headquarters as to who is approved to become members
Payment

- Members can pay by;
  - Credit card (Pay now) – CFA’s will receive an email asking for verification of chapter’s approval and will be processed immediately
  - Check payable to the Chapter – CFA’s will receive an email asking for check payment before processing will occur
  - Local dues are collected separately

- Some CFA’s collect individual checks and mail in one large check (preferred)
  - CFA’s will mail payment along with student forms and a signature signifying chapter approval (print email from headquarters, sign, and send with check(s)).

- Membership applications are processed daily
Certificates and Initiations

- CSI processes requests for certificates and pins on the 1st and 15th of each month.
- Letters and applications must be submitted in a timely manner to ensure certificates and pins arrive for the initiation ceremony.
- Training modules for initiation ceremonies can be found on the CSI website.
- The CSI bylaws require an annual initiation of new members.
Membership Lists

- CFA’s receive updated chapter membership lists at least annually
  - Lists sent in excel files
  - All members listed with date of induction
  - Active/inactive status and current contact information included
- CFAs may request membership lists at any time
- Questions about membership and membership processing?
  - csi-net.org/membership
  - Contact CSI: info@csi-net.org