



# **Chi Sigma Iota Chapter Leadership Manual**

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## Preface

Welcome to Chi Sigma Iota! Congratulations on joining hundreds of other chapters across the world in celebrating excellence in the counseling profession. This information has been created as a resource for your chapter's development and growth. Each topic provides valuable information related to your chapter.

### History, Purpose and Goals of CSI

Chi Sigma Iota, the Counseling Academic and Professional Honor Society International, was established January 1, 1985, following several months of planning by representatives of the Counselor Education program at Ohio University and leaders in the U.S. counseling profession. The impetus for the formation of an international honor society in the profession of counseling came from a desire to provide recognition for outstanding academic achievement as well as outstanding service within the counseling profession. The formation of an Honor Society appeared to be a fruitful avenue to provide a much needed link between students, educators, practitioners, and administrators in various counseling settings.

CSI came about as a consequence of the maturity of the counseling profession with national standards of preparation, ethical standards, national accreditation, national and state credentialing, and advancement of the art and science of counseling through research and scholarly publications. While the scope of the Society is international, it focuses on the personal and professional development of its individual members. The Society is committed to doing all it can to uphold the high standards of its members.

A separate honor society named Rho Chi Sigma was formed in 1979 to serve rehabilitation counselors. In January of 1989, after two years of discussion and planning, Rho Chi Sigma merged into CSI. The unification of the national honor society in rehabilitation counseling and services with the international honor society in counseling was welcomed as a major step toward unification of the counseling profession. The archives and history of this society are maintained at CSI Headquarters.

The Bylaws of Chi Sigma Iota (CSI) were adopted in 1985. The purposes of the Society, as noted in Article I of the Bylaws, are:

**"To promote scholarship, research, professionalism, advocacy, and excellence in counseling, and to recognize high attainment in the pursuit of academic and clinical excellence in the profession of counseling."**

The goals of Chi Sigma Iota are achieved primarily through the activities of local chapters, and secondarily, through efforts of the CSI Headquarters staff and international officers.

CSI Headquarters is responsible for maintaining the records of the Society, ordering and distributing certificates and pins, distributing information about the Society and ensuring a presence within the honors community. The staff are responsible for maintaining the database,

website, and day to day operations of the Society.

CSI Headquarters also serves as a networking source to link CSI chapters and members throughout the world. This has been an especially valuable resource for students who have moved to new locations after graduation and seek to affiliate with the nearest CSI chapter.

International meetings of CSI are held during the annual American Counseling Association (ACA) Conference & Expo in the spring of each year. These meetings include time for an Executive Council meeting, a Leadership Workshop, a Delegate Business Meeting for chapter representatives, an Awards Ceremony, and informal gatherings of members for the exchange of information as well as socialization. The annual Delegate Business Meeting is open to all CSI members. Chapters must send a representative at least once every three years to remain active.

Since the time of its chartering, CSI as an organization, and many of its individual members, have assumed leadership roles at state, regional, national and international levels in promoting counseling services to persons of all ages as well as the concerns of those who provide those services.

## **Purpose and Use of this Manual**

The first draft of this Manual was prepared in 1987, to initiate an annual practice of providing a leadership handbook and directory of persons involved in key positions within the chapters of the Society.

The Manual is designed to provide guidelines for new and continuing CSI chapters and their officers. It represents a system for ensuring that necessary tasks will not be overlooked and that there is no duplication of effort in CSI's administration.

Each chapter officer and committee chairperson is expected to review the description of his or her duties and responsibilities and to contact the current Chapter Faculty Advisor (CFA) to suggest additions or deletions as appropriate. The Chapter Faculty Advisor will forward any recommendations to the Chief Executive Officer of CSI International.

## **CSI Mission Statement**

The mission of Chi Sigma Iota is to promote scholarship, research, professionalism, leadership, advocacy, and excellence in counseling, and to recognize high attainment in the pursuit of academic and clinical excellence in the profession of counseling.

## **Sample Chapter Mission Statement**

Take a moment and review the CSI mission statement. An important first step in developing your chapter is to create your own chapter mission statement. To help your chapter, a sample chapter mission statement is provided:

The mission of \_\_\_\_\_ Chapter is to promote scholarship, research, professionalism, leadership, advocacy, and excellence in counseling, and to recognize their high attainment in the pursuit of academic and clinical excellence in the profession of counseling.

## **Organizational Structure: CSI and Its Chapters**

Headed by Dr. Holly Hartwig Moorhead, our Chief Executive Officer, your CSI leadership is comprised of today's leading counseling professionals. Your chapter can be, too! Take a look!

### **Organizational Governance of CSI International**

CSI is governed by an Executive Council which consists of the following officers: President, President-Elect, Past-President, Secretary, and Treasurer. The Chief Executive Officer serves as an ex-officio member of the Executive Council. This Council serves and acts between annual business meetings of the Society to conduct its business in keeping with member interests and directives. They also keep the membership informed via the Exemplar and website, and special correspondence when necessary through mail and listserv postings, of all matters of consequence which relate to the good of the Society.

The Executive Council meets at the ACA Conference & Expo to conduct the business of CSI. They also hold other meetings as deemed necessary but most business is conducted via email or virtual meetings.

The Society has several Committees which serve the Society and which merit continuous pursuit. Committee Chairs serve for a period of one to three years and are appointed by the President. The current Committees of CSI include the following: Awards, Chapter Development, Chapter Faculty Advisors, Counselor Community Engagement, Excellence in Counseling Research Grants, Leadership & Professional Advocacy, Leadership Fellow & Intern Selection & Mentoring, Life Member, Nominations & Elections, Professional Members, and Strategic Planning. Additional Committees or Task Forces may be established by the CSI President to work on matters of an immediate or non-recurring nature related to a specific purpose of CSI.

### **Society Year and Terms of Office**

CSI's fiscal year begins on May 1 and ends on April 30. The President of CSI serves on the Executive Council for three years (including years as President-Elect and Past-President). CSI's Treasurer and Secretary each serve a two-year term on the Executive Council.

### **Meet Your CSI Leadership**

Review the Leadership Directory at [www.csi-net.org](http://www.csi-net.org) to learn who makes up this year's CSI Executive Council. Have a question about your chapter and don't know where to turn? Contact one of our committee chairpersons for help and information.

## Chapter Development Needs

Do you have a question about your chapter's day-to-day operations? Do you know the duties of various officers and Chapter Faculty Advisor? Are you wondering which committees you should develop to grow your chapter? The answers to these and other important questions can be found below.

### CSI Chapters Overview of Role and Functions

Though international in scope, the activities of CSI are centered in the chapters of the Society. It is through the chapters that members are active and pursue the goals of the Society to the fullest extent possible.

CSI chapters serve as links within their respective communities to promote interaction between counselor educators, students, alumni, and local professional counselors. The chapters provide a forum for interaction, sharing of concerns, discussion of issues, and support for common interests. Professional development of members is of primary concern for chapters, as is service to members and to the counseling profession.

Many chapters schedule meetings and solicit speakers on a variety of topics relevant to counselors, thus serving as a resource for continuing education. Chapters also conduct a variety of service activities and organize a variety of social gatherings to facilitate interactions among members.

The creativity and efforts of individual chapter officers and members lead to numerous and diverse activities for the benefit of members as well as the profession of counseling. This manual is intended to help chapters realize their full potential for service to members.

Chapters strengthen their activities by working to become a recognized campus organization. For example, by applying through student government, CSI chapter members can become eligible for funding to attend conferences and other professional events. One way to achieve recognition is to participate in college honors day activities. CSI is a member of the Association of College Honor Societies (ACHS) and therefore meets the standards of its peers for excellence among such associations. This is important information for university administrators who oversee the distribution of student activity fees.

CSI chapters serve as a forum for interaction among counseling students, faculty, alumni, and professionals. Counselors in all specialty areas whose primary professional identity is that of professional counselor may be brought together under the auspices of CSI chapters. Of particular importance, as evidenced by the merger of Rho Chi Sigma into CSI, is the broad goal of unification of all members of the counseling profession.

### Organizational Governance of CSI Chapters

CSI Chapters are governed by an Executive Committee which consists of the following (required) officers: President, Secretary-Treasurer (this may be two positions), and one

representative from each of the specialized areas of study of the counselor training programs. Additional officers, such as a President-Elect and Past-President, may be added to the chapter officers at the discretion of the chapter. The Chapter Faculty Advisor (CFA) is an ex-officio member of the Chapter Executive Committee and it is through the Chapter Faculty Advisor that all correspondence with Headquarters is conducted.

This manual provides descriptions of duties for a variety of officers required by CSI International, and other officers recommended who may enhance the activity and contribute to the development of individual chapters. Chapters may, but are not required to fill optional or recommended positions. When such positions are not filled, however, the duties of that position must be subsumed under the duties of one or more of the other CSI chapter officers.

Chapter officers hold meetings of the chapter membership as deemed necessary, with at least one meeting per academic term. One meeting per year is to be designated as the annual meeting. This meeting should occur at about the same time each year. The Executive Committee meets and works between annual meetings to carry on the business in keeping with members' interests and directives. They also keep the membership informed via listservs, email, the chapter group site at [csi-net.org](http://csi-net.org), approved chapter social media, the chapter newsletter, and/or special correspondence when necessary, of all matters of consequence which relate to the good of the chapter.

The chapter may have committees which serve to facilitate chapter operations. Committee chairpersons serve for a period of one to two years and are appointed by the President. The committees may include the following: Audit, Awards, Bylaws, Counselor Community Engagement, Membership, Mentoring, Nominations & Elections, Professional Advocacy, Professional Development, Professional Members/Alumni, Publications/Newsletter, and Wellness. Other committees may be established by a Chapter as needed to work on matters of an immediate or non-recurring nature related to a specific purpose of the chapter.

## **Duties of Chapter Officers and Chapter Faculty Advisors**

### **Chapter Faculty Advisor (required)**

All chapters must have a Chapter Faculty Advisor (CFA), and any chapter that 1) has ever been declared inactive, and 2) was founded after September 17, 2010 must have both a Primary and a Backup/Co-Chapter Faculty Advisor approved by CSI Headquarters. The Chapter Faculty Advisor is the primary individual responsible for overseeing and mentoring the operation of the chapter. He or she functions much like the executive director of an organization. The elected officers of the chapter plan and conduct their activities in accord with the advice and consultation of the Chapter Faculty Advisor. Leadership development is a primary function of the person in the position. Even if a chapter still meets criteria for having only one required Chapter Faculty Advisor, all chapters are encouraged to have a Backup/Co-Chapter Faculty Advisor. This practice is especially helpful when a change in Chapter Faculty Advisor is anticipated to provide continuity of this important function.

The duties of the Chapter Faculty Advisor (which may be delegated to chapter officers in terms of authority but not overall responsibility) shall be to:

1. be responsible for all correspondence between the CSI Headquarters office and chapter members.
2. receive and transmit all correspondence with the CSI Headquarters office.
3. order and distribute certificates and pins in a timely manner (in all cases within the academic term in which they are ordered).
4. certify that all prospective members have met eligibility criteria for CSI membership and sign forms attesting to same.
5. coordinate and oversee activities of the CSI Chapter Executive Committee and members.
6. assure that the annual plan/annual report is completed and submitted in a timely manner.
7. notify CSI Headquarters of changes of officers.
8. assist in the selection of a new Chapter Faculty Advisor.
9. endorse chapter nominations for fellows, interns, and awards
10. serve as liaison with counseling faculty and other faculty in counseling departments or centers.

If a chapter needs to submit a new Chapter Faculty Advisor to CSI Headquarters for approval, a [CFA Change Form](#) must be submitted. Noting the new CFA on other reports is not sufficient.

### **Qualifications**

The Chapter Faculty Advisor must be a full-time faculty member in counselor education at the institution sponsoring the CSI chapter. The Chapter Faculty Advisor must also be a member in good standing (dues paying or life member) of CSI International. Eligibility of non-members require that the doctoral degree was earned through a CACREP accredited program or a program in Counselor Education and Supervision similar in title, scope, focus, and rigor to that of a CACREP program.

### **Term of Office**

The Chapter Faculty Advisor's term of office is contingent upon successfully satisfying the above functions as determined by the CSI Executive Council. Therefore, the appointment, periodic review and termination/continuation of a CFA ultimately rests with the CSI Executive Council in consultation with the local chapter. If needed, faculty members can periodically rotate responsibility for this function.

### **Chapter President (required officer)**

The Chapter President organizes, delegates, follows up, oversees, orchestrates, and sets a tone of enthusiasm for the chapter. It is the President's role to motivate people, support and recognize their efforts, celebrate their successes, and enable their activities. The President encourages the activities of members. The duties of the Chapter President shall be to:

1. exert leadership in achievement of the purposes of the CSI chapter.
2. preside at all meetings of the chapter and Executive Committee.

3. share with Executive Committee and membership (via chapter and/or CSI Exemplar) information received from various sources that may be of interest to CSI members.
4. assure that the Executive Committee actively participates in establishing and achieving annual goals.
5. assure that the Executive Committee actively participates in setting and achieving membership goals.
6. appoint Committees according to the chapter Bylaws and designate the Chair of each, including the Nominations Committee.
7. appoint other Committees as needed, with the advice and consent of the Executive Committee, and the stipulation that all Committee members must be members of CSI and of the chapter in good standing.
8. provide Committee Chairpersons and potential Chairpersons with relevant pages from this manual.
9. serve ex-officio on all Chapter Committees.
10. receive and direct outside reports, memos, and inquiries.
11. serve in a clearing capacity for internal organizational questions, concerns, and suggestions.
12. prepare a President's Column for each issue of the chapter newsletter (if there is one) to apprise the membership of the goals and activities of the chapter.
13. appoint the Editor of the chapter newsletter (if any).
14. coordinate activities of the Newsletter Editor (if any) and all Committees.
15. work closely with the CSI Convention Committee, or assign this function to another chapter officer, to insure responsible coverage of all convention procedures and activities, including representation at the annual business meeting of the Society.
16. conduct the official business of the chapter, including issuance of notice of meetings.
17. assure the maintenance of permanent records for the chapter, for example:
  - a. a disk or folder on the chapter webpage containing all recent memos and releases.
  - b. a disk or folder containing the minutes of the Executive Committee meetings and other chapter meetings.
  - c. a correspondence file.
  - d. minutes of special Committee meetings.
  - e. chapter archives or permanent record files.
  - f. membership record files.
18. pass on all relevant file material to his or her successor.
19. maintain close contact with the Chapter Faculty Advisor to keep him or her apprised of all correspondence and activities.

### **Term of Office**

- one year as President-Elect (highly recommended)
- one year as President (required)
- one year as Past-President (recommended)

### **Chapter President-Elect (recommended officer)**

The duties of the Chapter President-Elect shall be to:

1. perform the duties of the President in the event of the resignation, incapacity, absence, or death of the President.
2. become informed of the current affairs and activities of the chapter and become involved in these activities as requested by the Executive Committee.
3. serve as a member of the Chapter Executive Committee.
4. coordinate, with Chapter Faculty Advisor, the ordering of commendations for the outgoing President.
5. toward the end of the year, begin planning and contacting potential Committee Chairs for year as President.
6. keep files of activities and transfer them to the succeeding President-Elect.
7. perform various functions as requested by the President.
8. submit a report of activities and recommendations to the President for each Executive Committee meeting.
9. pass on all relevant file materials to his or her successor.

#### **Term of Office**

- one year as President-Elect (recommended)
- one year as President (required)
- one year as Past-President (recommended)

### **Chapter Past-President (recommended officer)**

The duties of the Past-President shall be to:

1. serve as a member of the Chapter Executive Committee.
2. perform the duties of the President-Elect in the event of the resignation, incapacity, absence, or death of the President-Elect.
3. serve as advisor to the President and the Executive Committee.
4. pass on all relevant file materials to his or her successor.

#### **Term of Office**

- one year as President-Elect (recommended)
- one year as President (required)
- one year as Past-President (recommended)

### **Chapter Secretary / Treasurer (required officer(s))**

Each chapter must have someone fulfill the functions of Secretary and Treasurer. The CSI International Executive Council includes both a Secretary and Treasurer. Chapters have the option of filling one or both offices, but must assure that all functions associated with both are fulfilled. The duties of the Chapter Secretary-Treasurer shall be to:

1. serve as a member of the Chapter Executive Committee.
2. keep records of the meetings of the Executive Committee.

3. take minutes of the Executive Committee meetings, and chapter business meetings, including a list of members and guests present, and distribute these at the earliest possible date to the Chapter Executive Committee members, Newsletter Editor (if any), and Chapter Faculty Advisor.
4. handle correspondence when feasible and appropriate, including meeting notices for members.
5. maintain a file of the minutes of the last three years.
6. write official correspondence as directed by the President.
7. pass on all relevant file materials to his or her successor.
8. assist the Chapter Faculty Advisor and officers in development and administration of the annual chapter budget.
9. maintain financial records of the chapter.
10. receive and disburse chapter funds.
11. send annual plan and annual report to CSI Headquarters including chapter calendar of events, names and addresses of officers, and any other information considered relevant to representing the success of the chapter in serving its membership and purposes.
12. update membership records, name and address updates, etc., on CSI website.

### **Term of Office**

The Chapter Secretary/Treasurer serves one or two years, at the discretion of the chapter.

### **Executive Committee Members-At-Large Area Representatives (recommended officers)**

One Executive Committee member shall be selected to represent each of the areas of specialized study at the university (e.g., community, school, rehabilitation, and college counseling; counselor education and supervision doctoral programs, and each specialty area defined by the Council for Accreditation of Counseling and Related Educational Programs [CACREP]).

The duties of each Member-at-Large shall be to:

1. serve as a member of the Chapter Executive Committee.
2. serve as Committee members and Committee Chairs at the request of the President.
3. volunteer to serve on any Chapter Committees.
4. provide materials for the Chapter Newsletter.
5. represent the interests of students, faculty, alumni, and professionals in their specialized area of study.
6. assist in recruitment of students, faculty, alumni, and professional counselors in their area of study.

### **Term of Office**

Members serve one or two years.

## Duties and Composition of Committees

### Types of Committees

In addition to the types of committees described in detail below (Audit, Awards, Bylaws, Membership, Newsletter, Nominations and Elections, and Webmaster), the Chapter President may choose to appoint committees that focus on areas such as Counselor Community Engagement, Mentoring, Professional Advocacy, Professional Development, Professional Members/Alumni, and Wellness.

### Audit Committee

The Audit Committee is composed of one Committee Member-at-Large and the Secretary-Treasurer, with the President and Chapter Faculty Advisor serving as ex-officio members.

The function of this Committee is to review the financial records of the chapter no less than annually and to prepare a statement for the Chapter Executive Committee. For those chapters required to report to their universities as a campus organization, the financial report may be filed with the appropriate university entity as well.

### Awards Committee

The duties of the Awards Committee shall be to:

1. apprise the Executive Committee of chapter awards criteria and deadlines.
2. prepare and submit nominations for CSI International awards.
3. prepare annual plan for solicitation and presentation of chapter awards.
4. solicit awards nominations, select and notify recipients.
5. work with the Chapter Faculty Advisor to order/prepare awards.
6. coordinate awards presentations at official functions.
7. provide training for the following year's awards committee members.

### Term of Office

Chair serves for one to three years, appointed by the President.

### Bylaws Committee

The duties of the Bylaws Committee shall be to:

- solicit and process suggested Bylaws changes from the chapter members and the Executive Committee.
- draft proposed amendments to the Bylaws for presentation to the membership at the annual business meeting and/or other meetings of the chapter.
- keep the membership informed about changes in the Bylaws.
- maintain a current set of Bylaws at all times, and distribute updated copies to all members of the Executive Committee after each Bylaws amendment.
- maintain accurate records, and transfer files to the incoming Bylaws Chairperson.
- submit a written report of activities to the President on an annual basis.
- copies of Bylaws changes should be sent to the chapter Newsletter Editor (if any) for the next newsletter.

- assure that all chapter bylaws are congruent with and approved by CSI International.

### **Term of Office**

Chair serves for one to three years, appointed by the President

### **Membership Committee**

The duties of the Membership Committee shall be to:

1. promote membership in the CSI chapter.
2. design and implement informational activities and procedures.
3. arrange for appropriate distribution of membership brochures.
4. analyze lapsed membership for patterns and suggest to the Executive Committee appropriate actions to prevent membership loss.
5. inform the membership of activities of the Committee.
6. prepare articles for the Chapter Newsletter (if any).
7. prepare an annual plan for membership invitation for submission to the Executive Committee at the annual fall meeting each year.
8. prepare an annual written report to the President for the annual business meeting.
9. assure that all counseling specialty areas are represented in the membership of the chapter.
10. pass on all relevant file materials to his or her successor.

### **Term of Office**

Chair serves for one to three years, appointed by the President.

### **Newsletter**

Chapters may elect to have a newsletter and appoint an Editor. For those chapters which have a newsletter, the following suggestions are made:

1. there shall be a regular production schedule for the newsletter.
2. an Editor shall be appointed by the President to solicit, screen, and edit material for inclusion in the newsletter.
3. copies of the newsletter shall be sent to the CSI Headquarters, CSI Newsletter Editor, and the current CSI President.
4. the Chapter Faculty Advisor shall review the newsletter prior to publication and distribution of each issue.

### **Nominations and Elections Committee**

The Nominations and Elections Committee is chaired by the Past-President (if the chapter has one who is active) or another person appointed by the President, and has two additional members appointed by the Chapter Executive Committee at the discretion of the President. The Committee serves for one year.

The duties of the Nominations and Elections Committee shall be to:

1. canvas by mail and solicit through meetings, the newsletter, and other means, nominations for the elective offices of the chapter.
2. prepare a slate containing not fewer than two names for each Chapter office to be filled.
3. select the nominees to appear on the slate based on qualifications for the office, field of interest, and the consent of the nominee.
4. provide nominees with a copy of the appropriate pages of this Manual.
5. publish chapter slate of officers and biographical information for members? review.
6. insure the announcement of the election results at a business meeting.
7. submit a written report of activities to the President prior to the business meeting.
8. pass on all relevant file materials to his or her successor.

### Webmaster

Chapters are encouraged to maintain the chapter's group site, which is hosted within csi-net.org. Because websites must be maintained, it is important that a member who is competent with basic web software and willing to oversee the chapter's web presence be appointed to this position. Assistance through CSI is available to answer questions about policies and appropriateness of content. In addition to the Chapter Faculty Advisors, up to two chapter leaders may be given administrative control over the chapter's csi-net.org group site by completing a [Group Admin Change Form](#). The chapter, under the direction of the Chapter Faculty Advisor, is responsible for the appearance, content, maintenance, and updating of the chapter website.

### Schedule of Election Activities

(suggested for compliance with CSI International Policies and Procedures)

March - January	solicit nominees; all nominees contacted to assure compliance
January 15	nominations closed
January	Executive Committee approval of slate
February	balloting by mail, online poll, or during meeting
March 15	notify all candidates of election outcomes
April	submission of names of officers to CSI Headquarters with annual plan/annual report
April	chapter holds transition meeting between old and new officers. View the sample script for the <a href="#">Installation of Officers</a>

### Chapter Meetings

The overall rule for chapter meetings is: Be creative and responsive to the needs of members.

## **When**

Chapter meetings must be held at least once an academic term, and may be held as often as deemed necessary by the Executive Committee. Most chapters have found meetings every 4-6 weeks to be satisfactory. Some chapters elect to meet during the summer months; others choose to sponsor social activities only during the summer; some choose not to meet except during the regular nine-month school term.

## **Where**

Chapter meetings may be conducted in both formal and informal settings. Some chapters use classrooms, others find board or meeting rooms to be more suitable. When combined with social activities, university Student Unions, apartment clubhouses, or individual members' homes may be suitable. Local counseling agencies with conference rooms may lend their facilities for meetings, combined with a tour of the facilities and a brief talk about the nature of their services and clientele. Churches or community agencies may provide meeting space. The Executive Committee may choose to meet over lunch or dinner, at school or workplace, or away from school or workplace.

## **Why**

Meetings may be of various types and for varied purposes. Business meetings seem to be better attended when combined with social or other activities, and when refreshments are provided. The business meeting should be held first followed by other activities.

Business meetings, in keeping with the Bylaws, are conducted according to *Robert's Rules of Order*. Such meetings can include reports from the President, Secretary/Treasurer and other officers, reports from Committees, reports and discussion of old business of the chapter, and discussion and planning of new concerns or activities. Business meetings also provide opportunities for recruitment of volunteers for the many activities which chapters may choose to undertake.

Successful meetings have included any or all of the following activities, to name a few, that CSI chapters have implemented:

- business discussions, reports of Committees
- professional development speakers (CE hours may be granted by sponsoring institutions)
- reports on recently read journal articles and books (limit each speaker to five minutes, plus five minute discussion)
- films and discussion
- debates on topics of current professional interest
- social activities designed to promote interaction among members

In addition to meetings and speakers, chapters have hosted all-day workshops and seminars as well as fundraising activities. Chapters may work in consortia with other CSI chapters to plan conferences and workshops. Chapters also have coordinated attendance at and/or speakers for state, regional, national, and international meetings. Some chapters have sponsored receptions for CSI chapters and members during state counseling conferences. Others have made

conference presentations, using members as presenters. Some have conducted sessions jointly with other CSI chapters.

## Membership Promotion

CSI members may be invited to membership from any CACREP accredited counselor education program that has been approved for inclusion within the CSI chapter. Each chapter should make special efforts to include members from all counseling-related programs on campus and in the community. Potential CSI members may be identified in several ways. Some of the primary ways include:

- Chapter Faculty Advisor review of enrollments and student GPA's
- solicitation of nominations by active chapter members
- solicitation of nominations by counseling faculty
- solicitation of nominations from agency staff and employers
- review of individual applicants by Chapter Faculty Advisor
- review of lists of state licensed/certified/registered counselors
- review of alumni lists provided by University alumni association
- recommendations from student internship/practicum supervisors

CSI has never had an open enrollment or grandparenting period. All members who are not currently students must have met the grade point criteria during their professional (graduate) training as well as hold the appropriate counseling credential. Membership promotion is related to publicity for the chapter, and is a function of chapter activities. The more active the chapter, the more persons will seek membership. To facilitate publicity, notices of chapter activities may be made through the chapter newsletter, website, bulletin boards on campus, and local newspapers. Memos inviting local professionals to participate in open meetings and activities sponsored by the chapter may encourage the involvement of non-campus participants.

After identifying prospective members, the chapter must send an official invitation letter to potential applicants before they can complete the online membership application at [www.csi-net.org](http://www.csi-net.org). A sample invitation letter is included with the [Membership Processing Checklist](#) on the CSI website.

Other suggestions for encouraging involvement include:

- establishing mentoring committees for students, wherein established students are assigned to mentor new students beginning with their acceptance and entry into graduate school.
- establishing a professional mentoring program to connect local professional members with students who are approaching graduation.
- offering differential fees for attendance at workshops, with CSI members paying substantially less than non-members.
- talking to beginning counseling students during class time about the benefits of CSI membership.

- writing NCCs in your area to invite them to join, if they meet the membership criteria (NBCC will provide a list of NCCs in your area in zip code order for a fee).

Membership criteria are specified in Article 4 of the [CSI Bylaws](#), which have been provided to each chapter. Membership application information must be reviewed, verified and signed by the Chapter Faculty Advisor as sponsor.

## Initiation Ceremonies

Initiation ceremonies should be conducted at least once a year, and preferably once a semester/quarter. The official initiation oath and procedures will be found on the CSI web page ([www.csi-net.org](http://www.csi-net.org)) under Chapters.

The first initiation for the chapter is extremely important. It is at that time that the Chapter Charter will be presented. It is recommended that the Charter be framed and hung in a prominent location in the departmental offices. If possible, a member of the CSI Executive Council, CSI's Chief Executive Officer, CSI's Chief Operating Officer, or an approved CSI speaker should be invited to participate in the awarding of the Charter and initiation of members.

Initiations are an appropriate time to invite such university officials as the counselor education department chair, the dean of the college, graduate dean, provost or president, and a reporter from the campus or local city newspaper. Invitations to family and friends are important, as the inductees are being honored for their academic and professional excellence. A program which includes an agenda and the names of initiates can be made available to those in attendance.

Chapters have elected activities such as the following for their initiations:

- banquet with speaker
- luncheon or brunch with speaker
- reception with speaker
- formal meeting with speaker
- candlelight reception with speaker

Speakers from any area of the counseling profession may enhance the significance of the event. Some chapters may elect to present certificates according to area of specialization to provide further recognition to the field of study and potential work setting of initiates. For the benefit of the audience, a few words of introduction for each initiate will heighten the importance of the event and underscore the excellence of initiates.

- [Initiation Scripts](#)
- [Awards](#)
- [Fundraising](#)
- [CSI Registered Trademark Logo Items](#)

## Awards

CSI encourages you to share with others the great work you will be doing by applying for CSI International Awards! Individual and chapter accomplishments are recognized during the CSI Awards Ceremony at the annual ACA Conference & Expo. Take a look at the [lists of possible awards](#), their descriptions and how to create your own chapter awards program.

## Fundraising

Do you have great ideas for your chapter but not enough money to do them all? You are not alone. It is a problem that many of our chapters report. Fundraising is an important part of generating funds for chapter events. [See examples of ideas and events](#) that have been successful at other chapters.

## Bylaws

All CSI chapters must have a set of bylaws to govern the operation of their chapter. Sample bylaws have been developed and are included in this section of the Manual. Chapter bylaws must be congruent with the bylaws of CSI International. Chapter procedures in any area may be more restrictive than the International Bylaws, but not less restrictive.

### [Sample Chapter Bylaws](#)

If a chapter would like to make any changes to their bylaws, a Chapter Bylaws Revision Rubric must be submitted to CSI Headquarters and approved.

## Publications

The *Exemplar*, your APEX Award-winning CSI news magazine, is a wonderful source of information and chapter happenings. [Past issues are available](#) on the CSI website. CSI members also have free access to our professional journal, the [Journal of Counselor Leadership and Advocacy](#).

## Dues

How are dues collected for members of your chapter? Is your chapter eligible for a rebate from CSI Headquarters? Answers to these questions and many more can be answered through [Fiscal Policies and Procedures](#).

## Calendar

Successful chapters are organized chapters! Another important step is the creation of a chapter calendar that will serve as reminders throughout the year. Consider how a calendar can benefit you and your chapter.

## Odds and Ends

There are a lot of details required to run a successful chapter! Do you have some questions that don't really fit into the above categories? Take a look at the links below to find answers to various CSI policies and procedures.

### Nuts and Bolts

The development and management of a CSI chapter requires attention to certain fiscal and other organizational activities. It is the responsibility of the Chapter Faculty Advisor to oversee these activities. The actual performance of these functions presents an opportunity for leadership development among chapter officers.

#### Fiscal Procedures and Management

On all checks, one signature should be that of the Chapter Faculty Advisor. Financial reports are to be prepared by the Chapter Secretary/Treasurer and presented at business meetings of the chapter.

As a part of CSI's unified dues structure, each chapter receives a rebate of \$10.00 per active member per year, upon submission of the Chapter Annual Plan by September 30 at least once every two years, submission of the Chapter Annual report by April 30 at least once every two years, attendance at the Delegate Business Meeting at least once every three years, conducting an Initiation Ceremony at least once every two years, and compliance with all other [CSI Approved Policies](#). This rebate is paid once a year, during June.

It is advisable to develop fiscal policies for the chapter, that include priorities for expenditures of funds, procedures for maintaining and auditing financial records, presentation of financial reports, and so forth. CSI uses a standard expense form for payment of all bills and will provide samples to chapters upon request.

Chapters may collect chapter dues from individual members and place the funds in the chapter bank account. However, annual chapter dues must not exceed \$25 (50% of the fee to join CSI as a new member). New members must pay the \$50 fee to join CSI by submitting a new member application on the CSI website ([www.csi-net.org](http://www.csi-net.org)).

The relationship of Chi Sigma Iota to its chapters is largely a contractual one; new chapters petition CSI Headquarters, in effect, for a "franchise" - a license to use CSI's name, regalia and other intellectual property and permission to certify to the National Office that the chapter's members are eligible for membership in CSI (which CSI Headquarters then duly records and accepts). CSI Headquarters does not create the chapters itself as in a "fully integrated" model (think of a department store that puts new locations in various cities) of business organization,

with full oversight and daily managerial control of the local affiliate; at its closest, one might even consider it a “parent/subsidiary” relationship, in which the parties are separate legal entities and the parent does not wield absolute control over the subsidiaries; nevertheless, through chapter (and national) governance structures and operating agreements (such as a requirement for bylaws and member qualifications), the parent can guide the general direction of the subsidiary without rigid, centralized control.

The main reason this description of the relationship between CSI and your chapter is important is because there are annual tax consequences that chapters must consider if and when they are in the business of raising money for any purpose (as, we assume, most are through dues, activities, etc.). CSI International is a tax-exempt 501(c)(3) charitable nonprofit organization by virtue of meeting the qualifications for that status with the Internal Revenue Service. Because CSI Headquarters and CSI chapters are structurally separate business entities, however, CSI National’s tax-exempt “certificate,” as it’s routinely called, **does not extend** to cover any of its chapters. Chapters are attached to specific colleges or universities in specific geographic locations, and as such, may (but usually are not) be covered by a tax exemption certificate at their home institution; it is a good idea for chapter advisors to contact their Student Organizations office or representative to determine whether this situation applies to them.

If a chapter does not have tax-exempt status at its host institution as an official student organization, Chapter Faculty Advisors should be aware of the potential tax liability their chapters may incur. This could be particularly problematic for chapters with larger membership bases and/or treasuries, or chapters at for-profit and/or private institutions of higher education. While the IRS has not tended to make a crusade out of pursuing smaller and (usually) more shallow-pocketed student organizations at colleges and universities, the potential is there for them to do so, and the deeper the chapter’s pockets and/or more lavish or questionable their spending, the more attention they may attract over time.

Chapter Faculty Advisors may wish to read IRS Publication 557, “Tax Exempt Status for Your Organization,” to learn more about thresholds, filing requirements and status available to their chapters under the tax laws of the United States (international chapters should, of course, refer to their own national tax laws). Remember, too, that state tax exemptions, while often predicated on IRS federal exemption status, may require completion of forms or additional work to comply with requirements of a state Department of Revenue. If necessary, the Chapter Faculty Advisor will want to complete Form 1023, “Application for Recognition of Exemption from Tax” and submit it to the IRS, and then begin filing Form 990 (or variants), “Return of Organization Exempt from Tax,” as required to comply with tax laws. CSI Headquarters can be of more assistance in informing chapters about this process, but cannot give specific tax advice to chapters as a separate business entity.

## **Processing Certificate Orders**

CSI Headquarters processes certificate orders after receiving an Initiation Date Alert Form from the chapter. Chapters are encouraged to submit this form as early as possible after scheduling an Initiation Ceremony.

The chapter must invite all prospective members to submit a New Member Application online at [www.csi-net.org](http://www.csi-net.org). After new member applications are received online, a list of new applicants will be sent to the Chapter Faculty Advisor each week for approval. Chapter leaders should provide prospective members with a deadline so that they will submit their applications more than two weeks prior to the scheduled Initiation Ceremony. Two weeks before the ceremony, CSI Headquarters will send the Chapter Faculty Advisor a final list of names to verify so that certificates can be printed and mailed before the ceremony.

CSI Headquarters is unable to accommodate “rush orders” of certificates, and any members who apply less than two weeks prior to an Initiation Ceremony will not receive a certificate until the following ceremony that the chapter schedules. All certificates will be mailed to the Chapter Faculty Advisor for distribution to members. CSI Headquarters is not able to mail certificates to individual members who did not attend a ceremony or who submitted a late application. Chapters are not permitted to print their own membership certificates.

Members are expected to participate in the oath of membership ceremony prior to receiving the certificate and pin. When this is not possible, the chapter officers may administer the oath in a private ceremony suitable for such an occasion of recognition. Distribution of membership material through university or other mailboxes especially without an oath of membership is strictly forbidden.

Chapters should maintain records of active members. CSI sends renewal notices to all members approximately 30 days prior to the expiration date of their membership. Renewal fees are returned directly to Headquarters. A list of members will be sent electronically to chapters upon request. Each chapter Secretary/Treasurer should update chapter records often. Members of CSI chapters are expected to be active members (dues paying or life members) of the International Society in order to be nominated for offices, awards, fellowships, or benefit from membership privileges.

## **Correspondence with CSI Headquarters**

Correspondence with CSI Headquarters should be sent through the office of the Chapter Faculty Advisor (CFA). Many universities provide a separate mail box for CSI mail in the counseling departmental office. While officers are free to correspond with Headquarters, such correspondence must be sent through the Chapter Faculty Advisor or with the Chapter Faculty Advisor copied on the email.

## **Annual Plans and Annual Reports**

An Annual Report must be received by CSI Headquarters by April 30 of each year, and an Annual Plan must be received by September 30 of each year. The Annual Plan and Annual Report must include names and terms of office of chapter officers, the names and addresses of the Chapter Faculty Advisor and Chapter President, a description of plans for the chapter for the

coming year (Annual Plan), and a description of accomplishments of the chapter during the previous year (Annual Report). Each report must be submitted at least once every two years.

Chapters will receive rebates only upon timely submission of the [Annual Plans and Annual Reports](#), and if all other requirements for active chapter status are met ([see Requirements for Maintaining Active Chapter Status](#)).

### **Attendance at Annual CSI Delegate Business Meeting**

The annual Delegate Business Meeting of CSI is held in conjunction with the annual Conference & Expo of the American Counseling Association. Chapters are required to send a representative to the Delegate Business Meeting at least once every three years, and will be asked prior to the meeting to submit the name of the voting representative to CSI Headquarters. Delegates must also sign in at the meeting for their attendance to be recorded.

Chapters which fail to send representatives to three consecutive Delegate Business Meetings may be declared inactive by the Executive Council, per Article 10 of the CSI Bylaws. Inactive chapters may not initiate new members, receive dues rebates, or exercise the rights of an active chapter until reinstated.

### **Voting in International Elections**

Voting for Chi Sigma Iota International officers occurs each year by a collective vote per active chapter. All active members within each CSI chapter should be invited to vote for the candidate they believe will serve CSI best.

During October, each chapter's leaders should contact their members about the CSI chapter voting procedures. Once all individual votes within a chapter are received, Chapter Faculty Advisors will tally their chapter members' votes and report the candidates receiving the highest number of votes using an online ballot provided by CSI Headquarters. The candidates that receive the highest number of chapter votes will be elected to CSI office.

## **CSI Approved Policies**

### **Advocacy**

#### **1. Counselor Identity Policy (1999)**

In keeping with its advocacy for the profession as well as an emphasis upon its excellence, all CSI public introductions and documents including awards, fellowships, election nominations, and Exemplar articles will reference only counseling credentials and affiliations.

#### **2. Creative Works Policy**

CSI does not customarily endorse or promote creative works by other than its committees, task forces, and officers in keeping with their Society charges. Under certain circumstances, when introduced early in a project's design and introduction, the CSI Executive Council, at its discretion, may endorse creative works meeting the following criteria:

- The work is about or concerned with promoting excellence within the profession through research, scholarship, leadership, preparation and/or practice.
- The authors are active members of CSI.
- Author royalties accrue to CS funds for use with special projects, fellowships, etc. not a part of the regular operating budget.
- CSI makes explicit the language, use of logo and methods that may be used to promote such work when the publisher/producer refers to the endorsement.
- Membership lists are used for no other purpose than to promote pre-publication of the work.

### **3. CSI International Advocacy Efforts Policy (2015)**

CSI's Chief Executive Officer oversees advocacy efforts within Chi Sigma Iota International.

### **4. Eligibility for Chapter Affiliation Policy (1999)**

The Executive Council of Chi Sigma Iota, to better define and clarify the mission and purpose of the Society, shall consider accredited institutional preparation programs eligible for sponsoring a CSI chapter as those which are clearly identifiable as COUNSELOR EDUCATION programs. This is to be defined in terms of the predominate professional affiliations and credentials of the regular, full time personnel who teach in and administer the program. Professional affiliations and credentials shall mean membership in the American Counseling Association (ACA) and its divisions and branches and credentials administered by state or national professional counseling agencies.

### **4. Trademarks Policy (1985; 1993; 2008)**

[www.csi-net.org](http://www.csi-net.org) and all related logos, products and services described in this website are either trademarks or registered trademarks of Chi Sigma Iota, and may not be copied, imitated or used, in whole or in part, without the prior written permission of Chi Sigma Iota. In addition, all page headers, custom graphics, button icons, and scripts are service marks, trademarks, and/or trade dress of Chi Sigma Iota and may not be copied, imitated, or used, in whole or in part, without the prior written permission of Chi Sigma Iota.

## **Chapters**

### **1. Cashing and Processing of Rebate Checks Policy (2014)**

Rebate checks must be cashed within the fiscal year in which they are issued. No uncashed rebate checks will be reissued or replaced once the fiscal year is over. Chapters requesting replacement of rebate checks may be assessed a processing fee to cover costs for staff and bookkeeper time and potential bank charges.

### **2. Chapter Acknowledgements of Appreciation Policy (2007)**

Certificates or plaques of appreciation are a suitable and encouraged practice related to administrators, non-member faculty, or others whose support is substantive and important to members, chapter faculty advisors, and chapters in general. Chapters, however, shall refrain

from bestowing honorary distinctions, awards, or memberships to persons who are not CSI members.

### **3. Chapter Dues Policy (2014)**

Chapter dues for new members may not exceed 50% of dues for CSI International.

### **4. Chapter Grants Policy (2014)**

Chapters may submit chapter grant proposals once every three years. Note: This does not apply to the new category of Statewide Networking Grants. There is no limit on those submissions.

### **5. Chapter Internet Presence Policy (2010)**

Chapters which develop a website, blog, Social Networking Site, or any other presence on the Internet are required to follow the CSI [Chapter Website Policy](#) and [Social Networking Policy](#), if appropriate, in the creation of the site. The site URL must be submitted to CSI for review along with the completed Chapter Social Networking and Internet Presence Review Rubric demonstrating that all aspects of CSIs policies have been addressed in creation of the site. Sites which comply with CSI policies will be linked from the CSI list of chapters.

The site URL must be submitted to CSI for review along with the completed Chapter Website Review Rubric OR the Chapter Social Networking and Internet Presence Review Rubric after reading the respective policies demonstrating that all aspects of the policies and their intent have been fully addressed. Chapters are not permitted to maintain sites on the internet that have not been approved by CSI. Non-approved sites are to be unlinked until approval is obtained.

### **6. Chapter Membership Policy (1999)**

Local Dues: Chapters may collect local dues in addition to that collected by headquarters as a part of the international dues; however, chapter officers must confirm that all such local members are current in their dues to CSI as well. No member may be active only at the local level, i.e., pay local dues, hold office, vote, or otherwise enjoy the benefits of active membership.

### **7. Chapter Rebates Policy (2016)**

Chapter rebates issued by CSI Headquarters are intended to be used by chapters to comply with CSI Bylaws Article 9.5, which requires chapters to provide services to members, including scholarly presentations, opportunities for social and personal development, service to others, and advocacy projects.

### **8. Chapter Websites Policy (2010)**

Chi Sigma Iota encourages chapters to develop and maintain websites to disseminate helpful information to members. It is extremely important that chapter pages be readily identified as

affiliates of CSI and that the CSI logo, which is trademarked, is displayed in an appropriate manner. When someone browses the web, and visits a chapter page, it must be immediately identifiable as a chapter of Chi Sigma Iota, International. This means that the same graphics, fonts (sizes, colors), etc. are used. Full details on requirements and resources for chapter websites are available on the [Chapter Website Policy](#) page.

## **9. Declined Members Policy (2010)**

Chapters are responsible for educating students concerning the nature and mission of CSI and eligibility criteria for the Society, and for making sure students realize that their eligibility is reviewed in advance of sending written letters of invitation, which are required for all new student members. We recognize that sometimes students who are not eligible apply for membership without regard to faculty input and without a written invitation. We applaud the efforts of faculty to decline those students who have applied and are not eligible. At the same time, increased numbers of students are learning about CSI, applying through active chapters, and later are being determined to be ineligible. Processing these applications requires considerable effort and expense on the part of CSI Headquarters to educate students about the Society while deleting their membership records and refunding their dues.

Therefore, it is the policy of CSI that any chapter may have up to three students who have applied and are subsequently declined within a fiscal year with no penalty. Chapters with four or more declined members will be assessed a processing fee of \$10 per declined member. The number of declined members will be calculated May 1 of each year and processing fees will be deducted from the chapter rebate.

## **10. Eligibility for Chapter Affiliation Policy (2010)**

The Executive Council of Chi Sigma Iota, to better define and clarify the mission and purpose of the Society, shall consider accredited institutional preparation programs eligible for sponsoring a CSI chapter as those which are clearly identifiable as COUNSELOR EDUCATION programs. This is to be defined in terms of the predominate professional affiliations and credentials of the regular, full time personnel who teach in and administer the program. Professional affiliations and credentials shall mean membership in the American Counseling Association (ACA) and its divisions and branches and credentials administered by state or national professional counseling agencies.

## **11. Internet Plagiarism for Chapters Policy (2011)**

When citing materials from csi-net.org on chapter websites, such as the CSI mission and vision, the source will be included in parentheses to show that this is a quote and the original author is CSI, International, i.e.: (csi-net.org). Chapters are encouraged to link to csi-net.org rather than quoting or copying materials from the website, as web page updates on CSIs website could cause chapter pages to be outdated or provide inaccurate information to members. Failure to comply with these policies, and all policies of CSI, may result in a forfeit of the chapter rebate or suspension of a chapter's ability to process new memberships until the chapter's internet sites are in compliance.

## **12. Member Certificates Policy (2015)**

Certificates of membership in CSI can only be printed and issued by CSI Headquarters. Chapters are not permitted to create membership certificates to serve as a temporary substitute or as an alternative certificate.

## **13. Policy Violations (2014)**

Chapters violating CSI policies may be subject to withholding of a portion of their annual chapter rebate. That portion may vary from 25% to 100% depending on the nature of the violation, as determined by the Executive Council.

Chapters notified of a policy violation by CSI Headquarters will remedy within 30 days of notification or they will be subject to sanction as determined by the Executive Council that may affect their rebate.

## **14. Presenter/Workshop Policy (1997)**

When CSI pays no portion of a presenter's travel expenses, chapters can collect fees, pay honoraria, expenses, etc. without regard to the following policy. If CSI pays any of the travel expenses for a chapter initiation, chapters may not collect participant fees for the services of the CSI sponsored presenter without prior approval of the presenter and CSI.

If a presenter agrees to do a workshop without an honorarium, fees may be collected only to cover expenses of the workshop (handouts, equipment and room rental, refreshments) including the travel expenses of the presenter.

If fees are charged for a CSI/chapter sponsored event, a sliding scale for students, CSI members, and non-members should be charged. The presenter shall approve fees and advertising in advance to assure that all arrangements are satisfactory.

## **15. Reactivating Chapters Policy (2015)**

A reactivating chapter will not be eligible to receive a chapter rebate that would have been issued during the year prior to the chapter's deactivation.

## **16. Social Networking Policy (2010)**

Social networking through websites such as Facebook has become a common practice and is a way for individuals and groups with similar interests to maintain contact, share ideas and information, and network for a variety of personal and professional activities. CSI chapters may choose to develop social networking sites for their local chapters on one or both of these sites. Social networking sites must be consistent with the following CSI Bylaws and policies and developed only with the prior knowledge and approval of the Chapter Faculty Advisor. Full details on requirements and resources for creating a social networking sites are available on the [Social Networking Policy](#) page.

## Leadership Fellows and Interns

### 1. Completion of an LFI Term Policy (2015)

If someone fails to meet their responsibilities as a Leadership Fellow or Intern (LFI) and are removed from the LFI program, they will be restricted from referring to themselves as an LFI in any professional capacity.

### 2. Leadership Fellow Policy (1999)

In an effort to encourage participation in the work of the Society and to invest in the leadership potential of its members, CSI shall select ten or more leadership fellows each year to assist in carrying out projects related to the mission and goals of the Society. The leadership fellows will serve on a CSI committee or project. Fellows will provide a written project(s) outcome summary including an accounting of a minimum of 10 hours in active service to CSI. Each leadership fellow's outcome summary will be submitted to the Executive Council two weeks prior to its annual business meeting.

### 3. Leadership Intern Policy (1999; 2008)

In an effort to encourage participation in the work of the Society and to invest in the leadership potential of its members, CSI shall select two or more interns each year to carry out projects related to the mission and goals of the Society. For a sum to be established by the Executive Council, interns will provide a written project(s) outcome summary including an accounting of a minimum of 100 hours in active service to CSI in addition to the CSI Executive Council meetings and CSI/ACA convention activities. Each intern's outcome summary will be submitted to the Executive Council two weeks prior to its annual business meeting. Upon approval and direction of the Executive Council, the Chief Executive Officer will disburse the funds to the interns.

In order to serve as a CSI Intern, individuals must maintain at least a 3.5 GPA in their studies prior to and during the CSI internship and have the continuing endorsement of the Chapter Faculty Advisor with respect to the individual's time commitment to serve CSI and meet chapter and academic/professional responsibilities appropriately. If either the individual or CFA have doubts about any of these conditions, they are expected to discuss them with the CSI Chief Executive Officer as soon as possible. This policy is intended to protect individuals from the pressure of serving CSI when the timing may not be in their best interests as life circumstances change and decisions made earlier prove impractical.

## Good Practices

### 1. Acknowledging the Death of CSI Members Policy (2009)

The Exemplar will acknowledge the death of CSI International Presidents and Academy of Leaders and Distinguished Scholars with an announcement of 400-450 words. This will highlight the deceased's career accomplishments, professional leadership, and CSI involvement.

For all other CSI members, the Exemplar will include a feature titled "In Memoriam" which will list the member's name and CSI chapter affiliation. It will also state, "Further information is included on the CSI website." On the website, a memoriam of no more than 100 words can be submitted by the faculty advisor or chapter president highlighting the deceased's career accomplishments, professional leadership, and CSI involvement. A picture may also be posted. This memoriam will remain on the web for two years.

## 2. Chapter and Research Grants Policy (2014)

Research and chapter grants awarded must be completed within the fiscal year in which they are awarded, with the exception of multi-year projects. Funding will not be provided across fiscal years.

## 3. Conflict of Interest Policy (2011)

This Conflict of Interest Policy of Chi Sigma Iota Counseling Academic and Professional Honor Society International (Society): (1) defines conflicts of interest; (2) identifies classes of individuals within the Society covered by this policy; (3) facilitates disclosure of information that may help identify conflicts of interest; and (4) specifies procedures to be followed in managing conflicts of interest.

- a. **Definition of conflicts of interest.** A conflict of interest arises when a person in a position of authority over the Society may benefit financially from a decision he or she could make in that capacity, including indirect benefits such as to family members or businesses with which the person is closely associated. This policy is focused upon material financial interest of, or benefit to, such persons.
- b. **Individuals covered.** Persons covered by this policy are the Society's officers and employees.
- c. **Facilitation of disclosure.** Persons covered by this policy will annually disclose or update to the President of the Executive Council on a form provided by the Society their interests that could give rise to conflicts of interest, such as a list of family members, substantial business or investment holdings, and other transactions or affiliations with businesses and other organizations or those of family members.
- d. **Procedures to manage conflicts.** For each interest disclosed to the President of the Executive Council, the President will determine whether to: (a) take no action; (b) assure full disclosure to the Executive Council and other individuals covered by this policy; (c) ask the person to recuse from participation in related discussions or decisions within the Society; or (d) ask the person to resign from his or her position in the Society or, if the person refuses to resign, become subject to possible removal in accordance with the Society's removal procedures. The Society's chief employed executive will monitor proposed or ongoing transactions for conflicts of interest and disclose them to the President of the Executive Council in order to deal with potential or actual conflicts, whether discovered before or after the transaction has occurred.

#### 4. Conflict of Interest Policy: Awards and Other Selection Committees

In keeping with appearances as well as evidence of the same in fairness, no one on a CSI Awards or Fellowship/Intern selection committee may receive an award or fellowship while serving on one of these committees. Likewise, no one serving on these committees shall participate in any manner in the discussion, review or voting related to immediate colleagues, friends, members of their chapter, or chapter award nominations of chapters of which they have been members.

#### 5. CSI Presenter/Workshop Policy (1997)

When CSI pays no portion of a presenter's travel expenses, chapters can collect fees, pay honoraria, expenses, etc. without regard to the following policy. If CSI pays any of the travel expenses for a chapter initiation, chapters may not collect participant fees for the services of the CSI sponsored presenter without prior approval of the presenter and CSI.

If a presenter agrees to do a workshop without an honorarium, fees may be collected only to cover expenses of the workshop (handouts, equipment and room rental, refreshments) including the travel expenses of the presenter.

If fees are charged for a CSI/chapter sponsored event, a sliding scale. For students, CSI members, and non-members should be charged. The presenter shall approve fees and advertising in advance to assure that all arrangements are satisfactory.

#### 6. Document Retention and Destruction Policy (2011)

This Document Retention and Destruction Policy of Chi Sigma Iota identifies the record retention responsibilities of staff, volunteers, members of the Executive Council, and outsiders for maintaining and documenting the storage and destruction of the Society's documents and records.

- a. **Rules.** The Society's staff, volunteers, members of the Executive Council and outsiders (i.e., independent contractors via agreements with them) are required to honor these rules: (a) paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the administrative staffs/departments or their equivalents; (b) all other paper documents will be destroyed after three years; (c) all other electronic documents will be deleted from all individual computers, data bases, networks, and back-up storage after one year; and (d) no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.
- b. **Terms for retention.**
  - i. Retain permanently:
    - *Governance records* – Charter and amendments, Bylaws, other Society documents, governing board and board committee minutes.
    - *Tax records* – Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax

audits.

- *Intellectual property records* – Copyright and trademark registrations and samples of protected works.

- *Financial records* – Audited financial statements, attorney contingent liability letters.

ii. Retain for ten years:

- *Pension and benefit records* – Pension (ERISA) plan participant/beneficiary records, actuarial reports, related correspondence with government agencies, and supporting records.

- *Government relations records* – State and federal lobbying and political contribution reports and supporting records.

iii. Retain for three years:

- *Employee/employment records* – Employee names, addresses, social security numbers, dates of birth, INS Form I-9, resume/application materials, job descriptions, dates of hire and termination/separation, evaluations, compensation information, promotions, transfers, disciplinary matters, time/payroll records, leave/comp time/FMLA, engagement and discharge correspondence, documentation of basis for independent contractor status (retain for all current employees and independent contractors and for three years after departure of each individual).

- *Lease, insurance, and contract/license records* – Software license agreements, vendor, hotel, and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during the term of the agreement and for three years after the termination, expiration, non-renewal of each agreement).

iv. Retain for one year:

- *All other electronic records, documents and files* – Correspondence files, past budgets, bank statements, publications, employee manuals/policies and procedures, survey information.

a. **Exceptions.** Only the Society's Chief Executive Officer or President may grant exceptions to these rules and terms for retention.

## 7. Election Tie Breaker Policy (2010)

In keeping with Robert's Rules of Order, the President shall cast the deciding vote in the case of a tie for offices within CSI. As a consequence, the CSI President does not vote in the annual officer election except in the case of a tie.

## 8. Internet Plagiarism for Chapters Policy (2011)

When citing materials from csi-net.org on chapter websites, such as the CSI mission and vision, the source will be included in parentheses to show that this is a quote and the original author is CSI, International., i.e.: (csi-net.org).

Chapters are encouraged to link to csi-net.org rather than quoting or copying materials from the website, as web page updates on CSIs website could cause chapter pages to be outdated or provide inaccurate information to members.

## 9. Non-Campaigning Policy (2011)

Candidates for international offices shall not campaign. Candidates found in violation of this policy will be removed from election slates.

## 10. Process for Determining Compensation Policy (2010)

This Policy on the Process for Determining Compensation of Chi Sigma Iota applies to the compensation of the following persons employed by the Society: The Society's Chief Executive Officer. The process includes all of these elements: (1) review and approval by the Executive Council or compensation committee of the Society; (2) use of data as to comparable compensation; and (3) contemporaneous documentation and recordkeeping.

- a. **Review and approval.** The compensation of the person is reviewed and approved by the Executive Council of the Society, provided that persons with conflicts of interest with respect to the compensation arrangement at issue are not involved in this review and approval.
- b. **Use of data as to comparable compensation.** The compensation of the person is reviewed and approved using data as to comparable compensation for similarly qualified persons in functionally comparable positions at similarly situated Society.
- c. **Contemporaneous documentation and recordkeeping.** There is contemporaneous documentation and recordkeeping with respect to the deliberations and decisions regarding the compensation arrangement.

## 11. Whistleblower Policy (2011)

This Whistleblower Policy of Chi Sigma Iota (CSI): (1) encourages staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the CSI; (2) specifies that the Society will protect the person from retaliation; and (3) identifies where such information can be reported.

- a. **Encouragement of reporting.** The Society encourages complaints, reports or inquiries about illegal practices or serious violations of the Society's policies, including illegal or improper conduct by the Society itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper

practices or policies. Other subjects on which the Society has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via the Society's human resources channels, unless those channels are themselves implicated in the wrongdoing. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

- b. **Protection from retaliation.** The Society prohibits retaliation by or on behalf of the Society against staff or volunteers for making good faith complaints, reports or inquiries under this policy or for participating in a review or investigation under this policy. This protection extends to those whose allegations are made in good faith but prove to be mistaken. The Society reserves the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.
- c. **Where to report.** Complaints, reports or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the bases for the complaints, reports or inquiries. They should be directed to the Society's Chief Executive Officer or President of the Executive Council; if both of those persons are implicated in the complaint, report or inquiry, it should be directed to President-Elect. The Society will conduct a prompt, discreet, and objective review or investigation. Staff or volunteers must recognize that the Society may be unable to fully evaluate a vague or general complaint, report or inquiry that is made anonymously.