



Oregon Association of Process Servers

# Procedure Manual

**Approved on December 3, 2013**

**OREGON ASSOCIATION OF PROCESS SERVERS  
PROCEDURE MANUAL**

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# MEMBERSHIP

## Membership Year:

OAPS membership year is January 1 – December 31.

## Membership Qualifications and Classifications:

- A. Oregon Regular Membership – An Oregon regular membership in the association shall be open to any person whose business, or the business for which they work, is engaged in the private process serving business within the State of Oregon and whose conduct is in compliance with all state, county and city statutes and court rules controlling private process serving. An Oregon regular member's name and company name (if applicable) and contact information shall appear in the association's printed directory and the association website. An Oregon regular member shall have one (1) vote in the conduct of association business, and is eligible to hold an office in the association.
- B. Oregon Associate Membership - An Oregon Associate membership in the association shall be open to any person whose business, or the business for which he/she works, is engaged in the private process serving business within the State of Oregon and whose conduct is in compliance with all state, county and city statutes and court rules controlling private process serving. An Oregon associate member's name and company name (if applicable) and contact information shall appear only in the association's printed directory with only one listing in the associate's primary county of business. An Oregon associate member has no vote in the conduct of association business and cannot hold an office in the association.
- C. Affiliate Membership – An affiliate membership shall be open to any person whose conduct is in compliance with all state, county and city statutes and court rules controlling private process serving in their state, and (a) who is engaged in the private process serving business outside the State of Oregon, (b) is engaged in business related to the private process serving industry, or (c) is a supporter of the private process serving industry in the State of Oregon. An affiliate member shall appear in the association's printed directory and on the website, designated as an affiliate member. An affiliate member has no vote in the conduct of association business and cannot hold an office in the association.
- D. Retired/Inactive Members - Any member, who has been a member in good standing for an uninterrupted period of at least five (5) years and has retired or become inactive in the field of process serving, shall be eligible to apply to the board of directors for a retired/inactive class of membership. It will be the determination of the board of directors to approve or disapprove the member's request. Annual dues will be set for this class of membership at the annual conference. This class of membership will entitle the member to have their name, address and telephone number printed in the membership directory (if requested), and receive a copy of the membership directory. The retired/inactive class of membership will have no voting rights. In the event a member in this class returns to an active role in the profession, they will be required to become a full member.
- E. Honorary Member - The board of directors, at their discretion, may designate any person an honorary member. Honorary members will be exempt from annual dues and will have no voting rights. This class of membership will entitle the member to have only their name printed in the membership directory. The board of directors, at their discretion, will have the power to delete any honorary member designation previously conferred.

**Application for All New Memberships (Oregon regular, Oregon associate and affiliate):**

A. The board of directors shall approve one membership application form to be used for Oregon regular, Oregon associate and affiliate memberships, including, but not limited to, the directory and the website.

B. The application for membership shall direct all applicants to mail the application and dues payment to the Administrator at the OAPS designated mailing address.

C. Anyone other than the Administrator who receives an application for membership from a prospect shall forward it, as well as the dues check, immediately to the Administrator at the OAPS designated mailing address.

D. The Administrator or designee will process all applications by:

1. Sending a copy of the application with payment and date recorded on it to the membership chair and the directory chair.
2. Sending a copy of the application and payment to the Treasurer.
3. Keeping the original of the application in the historical files.

E. The membership chair or designee will:

1. Review and verify all applications for completeness and clarity.
2. Contact NAPPS administrative office to verify the membership standing of the applicant.
3. Contact all applicants with any questions regarding the application.
4. Membership Application Discrepancies:
  - a. If there are discrepancies in the membership application and the membership chair is unable to obtain sufficient information to answer any questions to resolve any inconsistencies, the membership chair shall contact the president, board of directors and applicant. The board of directors shall then contact the applicant to arrange for mediation as a last effort to answer the questions and resolve the discrepancies.
  - b. Whether or not the inconsistencies are resolved by the board of directors, notice of the application for membership shall then be distributed to the general membership, together with the board of director's recommendation, if any.
5. Run a background check, as described under the Background Check section below.
6. Send first announcement to all OAPS members:
  - a. If the applicant is a **non-NAPPS Member** - Send an announcement to all OAPS members giving them 30 days to object to the application. The announcement shall include only the applicants name, city and business name.

At the end of the 30 days vetting period, if no objections have been received, the membership chair or designee shall notify all members of the acceptance of the applicant. The membership chair or designee shall include all the contact information for the new member.

b. If the applicant is a **current NAPPS Member** – OAPS membership is granted to all NAPPS members in good standing. The membership chair or designee's responsibility shall be to review all applications and verify that the applicant is in good standing with NAPPS. If in good standing, then the membership chair or designee shall notify all members of the acceptance of the applicant. The membership chair or designee shall include all the contact information for the new member.

F. Upon acceptance of the new member's application, the Administrator will mail a "new member kit" to the new member. The kit shall include the following:

1. Letter of welcome
2. Membership Certificate
3. Current OAPS Membership Directory
4. OAPS Procedure Manual
5. Most recent Newsletter

G. Upon acceptance of the new member's application, the Administrator will immediately place the new member's information on the OAPSOnline.com site.

### **Membership Objections:**

A. If an objection is received within the thirty (30) day period, the application will be held until the applicant submits a written reply to the objection or appears at a board of directors meeting to answer the objection(s) in person.

B. The applicant will have 30 days after the mailing of the written notice to respond to any objections. If the applicant appears in person, the executive committee of the board of directors shall meet in executive session to review the facts and make a decision.

C. If no written reply is received from the applicant, the application shall be considered rejected and applicant's dues refunded.

### **Background Check:**

A. This process from now on is referred to as OAPS background investigation, and is to be conducted on all OAPS members. The exceptions include those individuals who currently hold active notary commissions, private investigator licenses, those who are current NAPPS members, and those who hold concealed handgun permits in Oregon. Proof of these credentials is required to become exempt.

B. The scope of the OAPS background investigations will deliberately be limited yet comprehensive enough to insure due diligence within OAPS to maintain our organization's integrity. The scope of the OAPS background investigations will include:

1. Comprehensive nationwide criminal records check - This is basically a database search done on the subject on a national level (all 50 states) with search criteria being full legal name and date of birth. Merlin Information Services is a proprietary database that provides this service. This search can be accomplished by having a Merlin Information Services account and will be charged on a per hit fee basis which is very economical. Both national and comprehensive state criminal checks can be conducted as well as comprehensive reports.
2. Oregon state criminal records check – This can be accomplished through the Oregon Judicial Information Network (OJIN). OJIN is an online database network of specifically Oregon court cases. Once the OAPS Membership chair has established an OJIN account they can determine if *an individual or a business* has been, or is currently involved, in any litigation here in Oregon. All Oregon state courts (in all 36 counties) specifically civil, criminal, and domestic, are online with OJIN and include: circuit courts, district courts, probate courts, tax courts, and in some counties, traffic and other infractions. Pending civil and criminal cases are listed as well as restraining orders and anti-stalking orders. Search results include: dates, case numbers, parties to the cases, dispositions, docket information, sentences, warrants issued, and fiscal information.

3. Federal courts criminal records check – This can be accomplished by searching the U.S. Party/Case Index (USPCI) that can be accessed through PACER. The OAPS Membership chair can easily establish a PACER account online. By accessing USPCI you can basically perform a national federal criminal conviction search, not to be confused with an NCIC rap sheet. USPCI will allow you to search nationally for federal criminal cases that have been brought by the FBACKGROUND INVESTIGATION, DEA, ATF, Secret Service, Homeland Security, and other federal agencies when they allege a violation of federal law. Search criteria is full legal name and DOB or by case number.

4. Sexual offenders registry search - <http://sexoffenders.oregon.gov/SorPublic/Web.dll/main>, will reveal any sexual crimes associated with the subject. This is the State of Oregon Sex Offender Inquiry System. ORS 181.592 authorizes the Oregon State Police to make information about registered sex offenders available to the public. ORS 181.592(4)(c) authorizes the release of information on certain sex offenders to be posted on a public web site. This is that site.

5. DMV driving history check for DUI's and DWI's - By having a Record Inquiry/Dave Account set up with the DMV the OAPS Membership chair can access DMV driving records. See: [http://www.oregon.gov/ODOT/DMV/records/recinquiry\\_daveacct.shtml](http://www.oregon.gov/ODOT/DMV/records/recinquiry_daveacct.shtml) for detailed information.

C. The responsibility for conducting these criminal history checks should fall on the membership chair, Administrator or designee.

D. Membership shall be denied to any individual deliberately falsifying any information supplied on the membership application.

### **Membership Renewal:**

A. The annual dues renewal notice should be standardized by the board of directors to meet the needs of all who use it, including the Administrator, webmaster, membership chair, and treasurer. It should be possible to generate the dues renewal notice from the online information, placing the member's name and address on the printed notice for use in a window envelope.

B. Renewal notices are mailed, by the Administrator, to current members 30 days after the annual meeting. The dues renewal notice each year should be mailed to all members with a self-addressed return envelope enclosed addressed to the OAPS designated mailing address.

C. The due date for receipt of dues payment is January 1. Per the Bylaws, membership expires on January 31. By having it due on January 1, this gives the Administrator and the board of directors time to follow up on those that have not paid their dues yet.

D. The Administrator or designee will process the renewal notice by:

1. Review and verify all renewal forms for completeness and clarity.

2. Contact the member with any questions regarding their renewal form to establish the truth and accuracy thereof.

3. **If necessary and upon the board of directors directive**, investigate and conduct an OAPS background investigation on any renewal notice that has a cause for concern of potential criminal activity within the past year. These triggers include but are not limited to: (a) renewal applicants own admission, (b) other active member's testimony of suspicion or observations, and (c) the

public disclosure of potential criminal activity either to the grievance committee or to the board of directors.

4. Updating the OAPSONline.com site with payment received and any other changes the member notes on the renewal form.
5. Sending a copy of the notice with payment and date recorded on it to the directory chair.
6. Sending the notice and payment to the treasurer.
7. Keeping a copy of the notice in the historical files.

E. The treasurer should deposit all funds in the OAPS bank account(s) within two days of their receipt from the Administrator. Any funds sent directly to the treasurer should be immediately forwarded to the OAPS Administrator .

F. The treasurer should post all entries in QuickBooks with sufficient details to match the Administrator's records.

G. The Administrator should provide the membership chair with a report at least monthly of how many members there are, how many are Oregon regular, Oregon associate and affiliate members, and, if requested by the membership chair, the names of who are currently members.

H. At the request of any member of the board of directors, the Administrator shall produce any mailing labels, membership certificates, or other standardized forms.

#### **Resignation or Transfer of Membership:**

A. Membership in OAPS is recorded by the name of the individual, not a business name. It is the right of the individual member to take their membership with them when they move from one position to another or change employment, regardless of who paid the membership dues.

B. It is the responsibility of the individual member to keep their contact information current with OAPS. Contact information updates must be in writing to the OAPS Administrator or designee.

#### **Membership Changes:**

A. All membership changes and updated information must be sent, in writing, to the OAPS Administrator from the member that is requesting the changes.

B. Any member of OAPS who becomes aware of changed or incorrect contact information of any other member, both Oregon regular, Oregon associate and affiliate, shall pass that information to the Administrator who will contact the member of the changes reported and verify that they are correct then ask that member to send these changes, in writing, to the Administrator or designee.

C. Once changes are requested, in writing, the Administrator or designee will:

1. Update the OAPSONline.com website.
2. Send the changes to the membership chair, directory chair, newsletter chair and treasurer.
3. Immediately send a notice of membership changes to all members.
4. The changes will be published in the next newsletter.

# BOARD OF DIRECTORS

## Board of Directors and Meetings:

- A. The board of directors shall consist of the elected officers, the appointed chair of the standing committees, immediate past president and two elected Oregon regular members-at-large.
- B. The board of directors shall handle the regular business of the organization.
- C. Regular meetings of the board of directors shall be held a minimum of four times a year. Regular board meetings shall be open to all members. The board of directors meetings will be setup as follows:
  1. The Administrator will provide a draft agenda to the president for approval.
  2. Once the agenda has been approved, then the Administrator will send out a meeting announcement to the board of directors and all regular members with the agenda and the minutes from the last board of directors meeting.
  3. If a conference call or Skype is requested by any of the board of directors members, then the Administrator or president will set up the conference call line and/or Skype for the meeting and make sure there is a speaker phone available.

## Nominations and Elections:

- A. The two elected Oregon regular members-at-large serve as the nominating committee co-chairs. Their term of office shall be one year.
- B. At the beginning of their term, their duty is to learn about the OAPS members and assess who could fulfill the duty of the officers and nominating committee for the next administration.
- C. At the end of their term, their duty is to nominate the officers and nominating committee for the next administration.
- D. Thirty (30) days prior to the annual meeting the proposed board of directors slate will be sent out to all members along with the annual meeting announcement.
- E. The proposed board of director's slate will be voted upon at the annual membership meeting.

# MEETING OF MEMBERSHIP

## Annual Meeting:

- A. OAPS shall hold an annual meeting of the entire membership once during the calendar year for the purpose of electing officers, revising bylaws, adopting a budget, establishing a legislative goal, and any other business which the members deem appropriate.
- B. The Administrator or designee will help identify the location of the annual meeting by:
  1. Contacting venues with a request for proposal in the area determined by the board of directors.
  2. Putting together a spreadsheet of the venues, meal costs, meeting room rental, guest room rate, and other items that the venue has to offer.



3. Send this spreadsheet to the president for discussion and questions.
4. The president will either send it out to the board of directors via email to discuss and vote upon; or will add it to the next board of directors agenda for discussion and voting.
5. Once the location has been approved by the board of directors, the Administrator will move forward with securing the contract for the location.
6. The Administrator will be the main point of contact in working with the venue.
7. The Administrator will work with the president on setup, menu choices, speaker, and other logistics dealing with the annual meeting.

C. Thirty (30) days prior to the annual meeting an announcement will be sent out to all members which will include:

1. Agenda
2. Proposed board of directors slate
3. Proposed budget
4. Brochure for annual meeting
5. Proposals from the board of directors
6. Proposed bylaw changes
7. Any unfinished business

D. The Administrator will handle the registration of the annual meeting by:

1. All Annual meeting registrations will be sent to the OAPS designated mailing address.
2. The Administrator will record the amount received and check number.
3. The Administrator will send the treasurer a copy of the registration and the payment.
4. The Administrator will send out a confirmation to each individual that is registered.
5. The Administrator will handle onsite registration and logistics for the annual meeting, which will include:
  - a. Badges
  - b. Handouts (agenda, past minutes, budget, etc)
  - c. Food guarantees
  - d. Speaker needs
  - e. AV setup
  - f. Any pre-conference activities

### **Special Meetings:**

Special meetings of the membership may be called by the president or the board of directors. Upon written notice of 5% of the Oregon regular members, the president shall call a meeting. Notice of special meetings shall be given to the members at least 10 days in advance.

## **EDUCATION**

The education committee is a standing committee and will be comprised of a chair person who shall be appointed by the president and approved by the board of directors, and as many members as the chair deems necessary to effectively execute the education goals of the association.

### **Process Server Certification:**

The education committee is responsible for the development of the curriculum, approved by the board of directors, for the OAPS Internal Certification Program. This program shall contain, at a minimum, all the elements identified by the board of directors as necessary for the program. The committee shall also be responsible for the ongoing review and continual updating of the curriculum.

**Continuing Education:**

The education committee shall identify and develop subjects pertinent to the process serving profession. There should be a minimum of four (4) continuing education programs offered each year.

**Online Education:**

To be developed.

**Classroom Education:**

To be developed.

## **GRIEVANCE**

The grievance committee is a standing committee and will be comprised of a chair person who shall be appointed by the OAPS president and approved by the OAPS board of directors. This chair may appoint as many as three (3) neutral parties to assist in any investigation, interview or arbitration as the alleged grievance/complaint requires.

Any OAPS Oregon regular member, Oregon associate member in good standing or any former member in good standing at a time before their membership termination, may file a grievance/complaint against any other OAPS Oregon regular member or Oregon associate member.

**Complaints:**

A. A grievance/complaint may be in the nature of an alleged violation of the OAPS bylaws or code of ethics; or unethical or unprofessional conduct; or nonpayment of bills or invoices. It will be at the discretion of the grievance chair if any other issue submitted would fall under the jurisdiction of the grievance committee.

B. The complaining party (hereafter referred to as the “complainant” must have taken reasonable steps to solve the dispute with the other party (hereafter referred to as the “respondent”. If after ninety (90) days there is no resolution between both parties, the complainant must send a written complaint by USPS first class mail to the grievance chair and attaching all documentation of their contacts with the respondent in an effort to resolve the dispute.

C. When the complaint and documentation is received by the grievance chair, the complaint and documentation will be reviewed and the respondent will be notified by USPS first class mail of the filed grievance/complaint against them. The respondent will have fourteen (14) days to respond to the grievance/complaint from the date of the letter and attachments sent to respondent by the grievance chair.

D. If the grievance/complaint is for alleged violations of OAPS bylaws or code of ethics; or unethical or unprofessional conduct, the grievance chair may appoint neutral parties to conduct oral or written testimony from both the complainant and respondent.

E. If the grievance/complaint is for non-payment of bills or invoices, the complainant shall submit documentation of the attempts to collect the alleged debt to the grievance chair.

F. If there is no response from the respondent within fourteen (14) days after the letter sent to the respondent, the respondent is in violation of Article VII section 4 (c) of the OAPS bylaws. The board of directors, with a majority vote, may revoke the membership of the respondent.

G. If there is a reply from the respondent, a copy of the reply shall be sent to the complainant. If the complainant has a rebuttal response, it must be received by the grievance chair within fourteen (14) days of the date of the letter sent to complainant containing the respondents reply.

**Arbitration:**

A. If there is no resolution after all procedures have been followed as stated above, the grievance chair shall submit the matter to a binding arbitration panel (hereafter referred to as the panel) of three (3) impartial OAPS members in good standing selected by the grievance chair.

B. If the grievance/complaint is monetary, the grievance chair may determine the amount of funds to be deposited by each party with the OAPS treasurer.

C. The grievance chair shall provide each member of the panel with all documentation from both parties involved in the grievance/complaint. The panel may request additional materials, clarification or supplemental information from both parties.

D. The panel shall make a ruling and render a written decision based on the merits of the dispute with proposed sanctions, if any, and send their written decision to both parties and to the grievance chair.

E. The panel will treat ALL records, documentation either oral, verbal or written as “confidential”. The panel will not discuss the matter with anyone other than the grievance chair or the OAPS board of directors.

**Appeal:**

Either party in the grievance/complaint has the right to appeal the panel’s decision and must submit a written appeal within fourteen (14) days of the date of the panel’s decision to the grievance chair. The grievance chair shall notify the OAPS president of the appeal and state that the panel’s decision is stayed pending resolution of the appeal. If the appeal is not filed in a timely manner, the decision of the panel will be final; however the OAPS board of directors, at its option, may accept a late appeal. The appeal and all documentation shall be submitted to the executive committee at the next regularly scheduled OAPS board of directors meeting for a ruling, and said ruling will be deemed final and not subject to further appeal. Upon notification of the final decision, the grievance chair shall direct the OAPS treasurer to disburse any funds held in escrow to the prevailing party(s).

**Confidentiality:**

All matters referred to the grievance committee shall remain confidential. Once a matter has been resolved or disposed of, the grievance chair shall forward the file to the OAPS Administrator for retention. The grievance chair shall retain, for a period of three (3) years, a listing and disposition of each matter submitted to the grievance committee. These files are confidential and may only be accessed by the executive committee of the OAPS board of directors.

**Consistent Pattern of Complaints:**

A. Complaints Filed Against Any Member: Where a number of complaints **filed against** a member indicate a persistent pattern of nonpayment or unethical/unprofessional conduct, the grievance chair shall notify such member, in writing, that a continuance of similar complaints received by the grievance committee may result in reprimand, suspension, or expulsion. The member shall have fourteen (14) days from the date of the grievance chair’s letter to respond to the charge.

B. Complaints Submitted by a Member: Where a number of complaints submitted by a member indicate a persistent pattern and are deemed frivolous or without real substance, the grievance chair shall notify such member, in writing, of such finding and that such continued action by the member may result in

disciplinary action by the OAPS board of directors. The member shall have fourteen (14) days from the date of the grievance chair's letter to respond to the charge.

C. If, after notification by the grievance chair, the persistent pattern of filing complaints that are deemed frivolous or without real substance continues, the grievance chair shall refer the matter to the board of directors disposition. The board of directors, at its discretion, will determine what constitutes a persistent pattern and may take whatever disciplinary action it deems appropriate. The board of directors shall notify the grievance chair who will in turn notify the member, in writing, of the action taken.

**Revoked Membership:**

If membership is revoked, the ex-member shall not be eligible to re-apply for membership for a period of one (1) year from the date of the grievance chair's letter notifying the member that her/his membership has been revoked.

**Compliance:**

Failure to comply with the bylaws of this association, or the procedures as outlined in this procedure manual, or rulings and decision of the panel or board of directors, shall constitute sufficient grounds for suspension, expulsion, or any sanction the board of directors deems appropriate.

## COMMUNICATIONS

**Directory:**

A. In November, the directory chair will invite two (2) other members of OAPS to create the directory committee.

B. In November, the directory advertising form will be reviewed and revised, as needed, by the committee each year and published on the OAPSOnline.com website.

1. Starting in December, the directory committee members will call, email or fax anyone who might be interested in having an advertisement in the directory.
2. Suggested non-members might be insurance companies, software providers, office supply companies, etc.
3. Give them the annual cost, variety of sizes and the deadline.
4. When the advertising is confirmed, the directory chair will notify the Administrator and treasurer of the advertiser, amount due and size of ad.
5. If an invoice is needed, the directory chair will develop an invoice and send it to the advertiser. The invoice should note that it is payable to OAPS and sent to the designated mailing address. The invoice will be due and payable within 30 days.
6. All artwork needs to be photo-ready, preferably digital, and forwarded to directory chair.
7. The directory advertising form and payment will be mailed to the OAPS designated mailing address.
8. The Administrator will process the payment and form.
9. The Administrator will send a copy of the form to the directory chair.
10. The Administrator will send original form and payment to the treasurer for deposit.

C. Starting in mid-February, the directory chair will do the following:

1. Work with the Administrator on a PDF of the current membership listing as seen on the OAPSOnline website.
2. Gather from the Administrator any new membership applications received during the previous year and the renewals received through January 31.
3. Confirm any changes or discrepancies with the member and/or the Administrator to be sure

all correct information is being published.

4. Compile the website data with the ads and inserts. Review the rough draft for spacing, errors or omissions and flow.
5. In mid-March, after a final draft is approved by the committee, download a printable version to take to a print shop.
6. The print shop will print two sided, insert tabs and bind the directory.
7. The print order shall include at a minimum of 15 additional directories.

D. At the end of March, the directory chair will create membership certificates. The certificates will include:

1. Member name
2. Oregon regular member – As a voting member in good standing for the year.
3. Oregon associate member – As an Oregon associate member in good standing for the year.
4. Affiliate member – As an affiliate member in good standing for the year.
5. The president and the secretary sign all membership certificates.

E. By no later than April 15, the directory chair will distribute, via mail, the directory to full members with their certificates (signed by the president and secretary); affiliate members with their certificates (signed by the president and secretary); the Administrator and anyone who paid for an ad in the directory.

#### **Newsletter:**

A. The newsletter is developed by the association Administrator.

B. Schedule:

1. The newsletter goes out two (2) weeks after every board of directors meeting and three (3) weeks after the annual meeting.
2. A special newsletter will be sent out during the first week of August. This edition shall include all pertinent information regarding the annual meeting, including but not limited to: the date and location of the annual meeting and registration form.

C. Articles and information come from the board of directors. Members can send articles to the Administrator.

D. Information from the Administrator, such as, annual meeting registration and membership updates will be included.

E. Once the newsletter is drafted, the president and secretary will review the document for final approval.

F. The newsletter is sent to all members - Oregon regular, Oregon associate and affiliate - via email in a PDF format. If an email address is not available, then it is sent via regular mail or fax.

G. The newsletter is not to be used as a political platform or as an editorial opinion. Any member wishing to express their views or concerns on a specific issue may submit a letter for publication. All such letters will be reviewed by the editor for appropriateness. If the editor determines a letter is not appropriate, the editor will notify the president, who will review the letter and make a final decision. If the decision is to omit the letter, the sender will be notified by the editor.

**Website Updates:**

- A. Website updates are sent by the member requesting the change, in writing, to the Administrator.
- B. The Administrator will administrate the website changes.
- C. If the changes incur a fee beyond the approved budget, then a proposed cost will be generated by the website chair and introduced and discussed at the next board of directors meeting for approval.

## **FINANCE**

**Budget:**

- A. The annual budget preparation will begin in mid-August by the president, treasurer and Administrator.
- B. All committee chairs are responsible for submitting their line items for the annual budget to the Administrator.
- C. The annual budget recommended by the budget committee will be submitted to the board of directors at their meeting prior to the annual meeting for their recommendation to the membership.
- D. The annual budget recommended by the board of directors will be sent out with the meeting notice of the annual meeting thirty (30) days prior to the annual meeting.
- E. The annual budget will be submitted to the membership at the annual meeting for consideration and adoption.
- F. Non-budgeted items must be pre-approved by the board of directors.

**Check Requests:**

- A. A check request form will be reviewed and revised, as necessary, by the treasurer and Administrator.
- B. For payment/reimbursement of any item, a check request must be completed and backup paperwork attached.
- C. A check request must have at least one board of directors signature on it. The same person requesting the funds cannot also sign off on the check request.
- D. The check request with back up paperwork is submitted to the treasurer for payment.
- E. The treasurer will indicate the payment date and the check number on the check request and file for historical records.