

**NASW-Oklahoma Chapter**  
**District Board**  
**Member Handbook**

**2020-2021**

The NASW-Oklahoma Board of Directors Leadership Portal can be found at  
<https://naswdc.sharepoint.com/sites/okbod/Shared%20Documents/Forms/AllItems.aspx>

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## WHO SHOULD I ASK...? At-a-Glance

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Chapter legislative efforts	Communications (i.e., sending an e-mail blast)
Contracts	District finances
Event cancellations, etc.	Event registration forms
Large chapter events/conferences	Membership status
Securing speakers and/or venues	Setting up an event
Sign-in forms	Sponsorships and co-sponsorships

## **DISTRICT CHAIR RESPONSIBILITIES**

These are district chair responsibilities at-a-glance:

*Contact your outgoing district chair:* Past district chairs are one of your best resources as a new district chair. Meet with your outgoing district chair (if applicable) to discuss what type of activity is going on in your district as well as past successes and failures. You will also want to gather contact information of active leaders in your district.

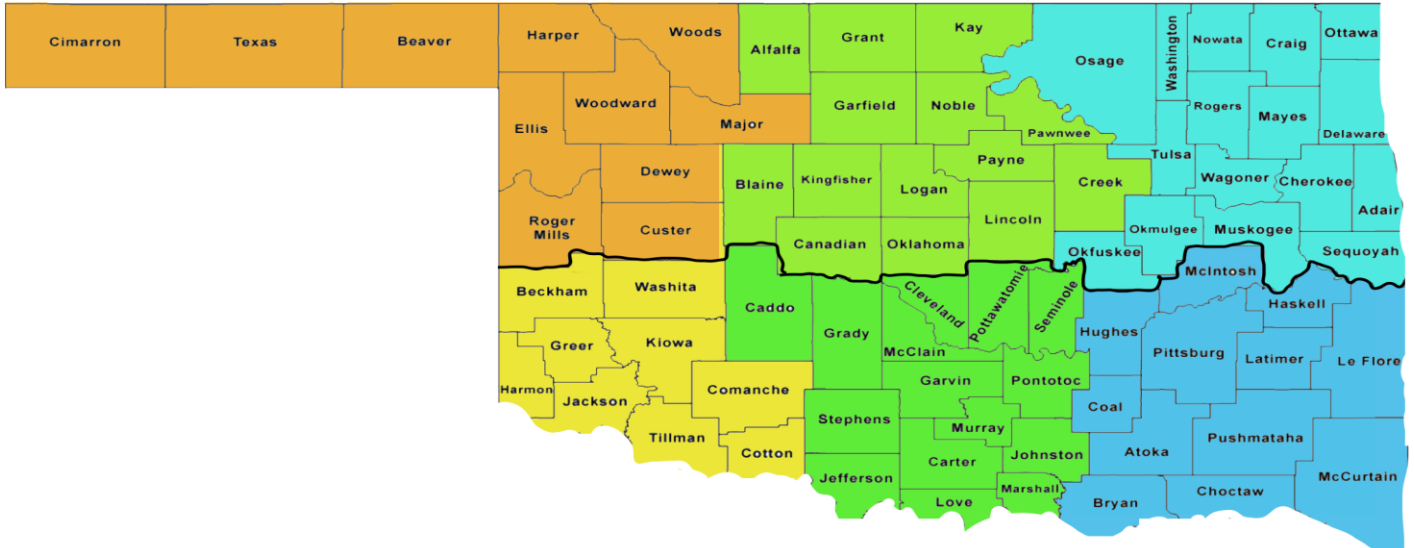
*Quarterly board reports and meetings:* A report is submitted by the district chair in advance of the quarterly NASW-Oklahoma Chapter Board of Directors meetings. It is then compiled into a summary report for distribution to the board. District chair conference calls are conducted quarterly in advance of the board meetings. District chairs are also expected to attend all four quarterly board meetings during their term. The dates will be distributed and voted on during the fall meeting for the upcoming fiscal year, beginning on 09/01.

*Event planning:* Each district chair is responsible for organizing a minimum of four (4) events (3 CEU trainings) during their tenure (one event each quarter) in their district. The event may be a networking or CEU event although the chapter recommends hosting CEU events as this helps with attendance. One of those events is a mandatory event for Social Work Month (March). More information about planning an event can be found later in this manual.

*District updates:* Each district chair is responsible for submitting a district update each month of their term to their district. These updates (submitted through the chapter website) are featured in the beginning of month e-mail blast to the entire membership. These updates should inform members of upcoming district events, share important news from the chapter and national office, and welcome new members. Equally important is how the updates are archived on the chapter website which allows for past, present, and future district chairs to purview the activities within their district.

*Mentoring:* Each district chair is responsible to incorporate the Board of Directors Student Representatives and student members in the planning, organizing, and execution of Chapter activities to the extent possible. It is recognized not all districts have access to a school of social work, therefore, are at a disadvantage. However, BOD Student Representatives and/or may live in a district and attend school in another. Inasmuch as possible, the NASW-OK Chapter staff will assist in identifying students that may have a connection to districts outside of those with a school of social work.

# DISTRICT MAP



## **DISTRICT FINANCES**

### **DISTRICT FUNDS & REIMBURSEMENTS**

District chairs have two options when paying for event-related items. They can:

1. Pay for item(s) themselves and submit receipts along with the Leadership Travel Expense Report (limited use with advanced notice to Chapter Staff).
2. Contact executive director to pay with chapter credit card where possible (e.g., security deposit on a chapter venue).

If you have negotiated a payment for a speaker, you will need to have the speaker submit a W-9 and invoice of payment to the executive director. Significant speaker fees must be pre-approved by executive director. See also page 8 for more speaker information.

## **ANNUAL NASW-OKLAHOMA CHAPTER SOCIAL WORK AWARDS**

### **GENERAL INFORMATION**

The annual NASW-Oklahoma Chapter Statewide Social Work Awards are presented in the fall in conjunction with the fall statewide conference. There are four awards given out each year:

- Student of the Year
- Emerging Leader of the Year
- Social Worker of the Year
- Lifetime Achievement



Nominations can be submitted by anyone, though only NASW-Oklahoma Chapter members are eligible for awards. Nominees will be considered by the NASW-OK Chapter Awards Committee and the statewide awardees will in turn be sent for consideration for the national NASW Awards.

### *SOLICITING NOMINATIONS*

We rely heavily on district chairs soliciting members and colleagues for nominations in order to get a full representation of deserving social workers/colleagues around the state. Please promote the awards to district members in district updates, e-mail blasts, and at district events.

### **AWARD CATEGORIES**

- **Student of the Year:** A NASW-OK member who is a student in a BSW, MSW, or Doctorate program who: demonstrates leadership qualities (active member of student organizations), contributes to the positive image of a social work program, commitment to political and community activities, success in academic performance, degree to which the student represents the professional ethics of social work as defined in the NASW Code of Ethics.
- **Emerging Leader:** Emerging leaders are “early” career social workers that have demonstrated exemplary leadership, expertise, and dedication to the profession in the state of Oklahoma, whose contributions enhance practice knowledge and/or the capacity of the profession and the human service to obtain resources and influence. They have all demonstrated excellence in a variety of areas, including public or nonprofit agency-based practice, policy/legislative advocacy, academia, resource development, and administration.
- **Social Worker of the Year:** An NASW-OK Chapter member in good standing who: reflects the values espoused in our NASW-Oklahoma Chapter Mission Statement; promotes the NASW to the public and advocates for the populations social work serves; represents the highest ethical standards of social work as defined in the NASW *Code of Ethics*; contributes to improvement of the social fabric in tangible and intangible ways; takes risks and enlists public support for improved human services.
- **Lifetime Achievement Award:** An NASW-OK Chapter member in good standing who: has accomplished stellar successes in his/her social work career which have enhanced the profession, supported clients, upheld social work values, and advocated for the betterment of all people.

## **DISTRICT EVENT PLANNING**

*What follows are some helpful guidelines of how to plan, promote, and run your event. You will first need approval from the chapter for your event, so remember to plan your events well ahead of time—at least thirty (30) days in advance.*

District chairs are required to host at least four (4) events each year. There is one (1) mandatory district event during Social Work Month in March. CEU events must be open to all licensed social workers regardless of membership status.

### **EVENT DOs AND DON'Ts**

#### *Do*s

- DO host a minimum of four programs (minimum of 3 CEU events) including a mandatory event in Social Work Month (March).
- DO organize different kinds of events (CEU workshops or networking events) in all areas of your district to ensure reaching members in all areas of the state. This is of particular importance to those in larger district regions.
- DO plan your event in advance—the chapter office requires thirty (30) days notice in order to properly promote your event.
- DO charge for events—events may generate additional revenue for the district to use towards future programming.
- DO ask if your speakers have other presentations they can present.

#### *Don't*s

- DON'T advertise a third party event. If a third party or person (e.g., agency or university) approaches you to share their event to your district members, let them know you can't promote a third party product. Instead direct the individual to the chapter office. ***District chairs are not authorized to promote non-NASW events or products.***
- DON'T negotiate a sponsored event. If a third party or person (e.g., agency or university) approaches you about hosting a district event that: 1) You have not been involved with planning, and 2) The third party will be receiving all/partial revenue from the event, this is a **sponsored event** and must be forwarded to the executive director.
- DON'T spend all your district funds on one event—remember that your district allocation is to last you for the entire year.
- DON'T plan events during the month of the chapter statewide conference.
- DON'T schedule the same training more than once a year (half a district chair term).
- DON'T use district funds to pay for alcohol. To avoid incurring potential liability district funds cannot be used to pay for alcohol nor can district chairs provide alcohol. It is permissible for attendees to purchase alcohol from a vendor with liquor liability insurance (bar, caterer, etc.).
- DON'T sign any contracts—district chairs are not authorized to sign contracts and should instead send them to the chapter office for approval.
- DON'T directly compete with chapter revenue—generating offerings like advertising and label rentals to third parties.

**AT-A-GLANCE CALENDAR WORKSHEET**

Use the below calendar to come up with the best months for you to begin planning your programming for the coming year.

2019 (2 events min.)	2020 (2 events min.)
<b>January</b>	<b>FEBRUARY</b>
<b>MARCH: Social Work Month</b> <i>Mandatory District Event</i>	<b>APRIL</b> <b>Legislative Education &amp; Advocacy Day</b>
<b>May</b>	<b>June</b>
<b>July</b>	<b>August</b>
<b>September</b>	<b>October</b>
<b>November</b>	<b>December</b>

*What kind of event should I hold?* Breakfast or after-work social networking events; CEU trainings; lunchtime series; ethics and cultural competency trainings.

*Where can I hold an event?* Local library; community center; school or university; sectioned off area in a popular local restaurant.



## PLANNING AND ORGANIZING AN EVENT

The following are things to think about when you begin planning your event:

*What kind of event are you hosting?*

- A **regular district event with no CEUs** (such as a networking event)
- A **regular district event with CEUs**
- A **co-hosted event** wherein a third party is providing some of the expenses (e.g., venue, food, speaker fee) but the event is still fully organized by district chair

NOTE: District chairs do not have the authority to negotiate the terms of a **sponsored event** wherein a third party (such as a university or agency) has completely organized an event themselves and are receiving partial/all revenue from the event. You must forward such queries to the executive director.

*When will you be holding your event?*

The time of day is something to strongly consider, as well as the day of the week. It is suggested to try different days/times and ask for feedback on the evaluations to help plan future events. Some members have better availability on weekends vs. weekdays, evenings vs. lunchtimes.

*Where will you host the event?*

Where you hold an event depends on what kind of an event you're having. CEU events are best held at quiet locations such as colleges/universities, public libraries, or other nonprofit agencies. Networking events are best held at social places like restaurants. Be creative with your locations, and be sure to hold events in all areas of your district, not just areas near where you live and work. **IMPORTANT!** Any contracts **MUST** be forwarded to the executive director for signing.

*Will someone be speaking at your event?*

You will need an experienced speaker to present on a topic for CEU events. The district chair may find presenters individually, by requesting assistance from the executive director, or from previous district chairs. Do not schedule the same training more than once per year. Presenter fees funds are limited at this time and typically reserved for the annual state conference.

From the speaker, you will need to collect the following information:

- A workshop title
- Speaker bio
- Length of presentation
- Workshop marketing description to be used for promotional purposes

*How much should you charge for the event?*

- **Networking Events:** Use your judgment to charge a reasonable entry fee to cover the cost of the event (venue, food, etc.). There must be a price difference between member and nonmembers. Generally the chapter has made networking events free to members and charged \$12 to nonmembers.
- **CEU Events (not ethics):** It is suggested that each district hold one free CEU event for members each year, but nonmembers must pay a minimum of \$12 per CEU. Additional fees

for workshops should be determined according to the ongoing cost of the event to cover cost of food, speaker fees, etc. Events should, if possible, bring revenue back to your district.

- Ethics CEU Events: Districts must charge a minimum of \$50 for members and \$80 for nonmember for events offering three ethics CEUs. Please contact the chapter prior to setting fees for all ethics-related events.

### **EVENT APPROVAL**

Once the event time/date and speaker/topic has been determined, the following information will be required.

Information to have prepared:

#### Category One

- Event title
- Event date
- Event time
- Description of event (in complete sentences)
- Event location
- Co-Host name and provisions (if applicable)
- Attendee number limit (check to make sure if venue has a limit)
- Event fee for member/nonmember

#### Category Two

If providing CEUs, you will also need the following (Be sure to work with your presenter to get accurate information):

- Presenter names
- Marketing description for event (in complete sentences)
- # of CEUs provided
- Expected outcomes of the event
- Teaching method

**Event Approval Form (EAF) will be created for submission on line.**

Even if you are not offering CEUs for an event, you must submit all items from Category One for it to be posted to the website calendar. You cannot promote your event until has been approved by the chapter. You will receive notification from the chapter once your event has been approved along with the event registration link.

**PROMOTE YOUR EVENT**

District chairs are also responsible for promoting their event to district members. There are two ways of promoting your event to members: one is through a district update and the other in a direct district e-mail blast to members. Below illustrate the differences between both as well as instructions on how to submit either.

	<i>What Is It?</i>	<i>When Do I Send?</i>
<b>DISTRICT UPDATE</b>		
<i>For district news and activities at-a-glance</i>	The update that is submitted through the chapter website is featured in the monthly e-mail blast to all members. It's a great way of doing a soft announcement of a new event to district members, share important news from the chapter and national office, as well as welcome new members to the district. Equally important is how the updates are archived on the chapter website which allows for past, present, and future district chairs to purview the activities within their district. We <b>STRONGLY</b> encourage our district chairs to get into the habit of submitting these updates each month.	Usually submitted two to three days before the end of the month. You will receive a reminder e-mail from the communications manager in advance of the deadline.
<b>E-MAIL BLAST</b>		
<i>For promoting a district event or reminding district members of an upcoming event</i>	The e-mail blasts are a great communicative tool for district chairs. We encourage you to send out an e-mail blast announcing a new event (once that event has been approved by the chapter) as well as a reminder e-mail a week in advance of the event. If you notice low registration for an event, sending an e-mail blast is a great way of reminding your district members of an upcoming event. Try to avoid duping language in your e-mail blasts with your chapter updates. We strive to keep communications with chapter members new and relevant so that we can avoid members unsubscribing to our e-mails.	Whenever applicable, usually announcing an event or a reminder e-mail.

## **SUBMITTING A DISTRICT E-MAIL BLAST**

For distribution of district or statewide emails, forward the email to the Chapter Executive at [director.naswok@socialworkers.org](mailto:director.naswok@socialworkers.org).

Examples of email blast;

- Call for Committee Members
- Call for Conference/Event Proposals
- CEU events
- Legislative News
- Networking events
- News & Updates

Please allow one to two business days for email blast. You will know when your e-mail blast went out when you receive a copy of it to your inbox.

## WHAT TO DO AT YOUR EVENT

1. Get the pre-registered sign-in sheet: You will receive via e-mail from the events coordinator a sign-in sheet at least one day out from your event. This sheet will contain the names of pre-registered attendees.
2. Print out Form - On-Site Registration BW, Form - Evaluation, and ISBE Evaluation Form (if applicable; for those seeking CPDUs): These forms can be downloaded from the District Chairs folder to be established.
3. Have attendees take an Evaluation Form and sign in. Depending on whether the attendee pre-registered to attend or not indicates how they will need to sign in:
  - **Pre-registered attendees** only need to write in their names and time in/out on the sign-in sheet. Only individuals who have signed in with their names and in/out times will be sent CEUs.
  - **On-site registrants** must write in their names onto the sign-in sheet (there will be a section for on-site registrants), complete a Form - On-Site Registration BW in full, and submit payment. Payment methods accepted include: cash, check, and credit card. NOTE: Be sure to verify that: 1) The On-Site Registration Form is completed in FULL, 2) All credit card information is correct and accurate, and that 3) All information is *legible* as illegible writing will likely mean an individual will not receive their CEUs.
4. After the event is over, be sure everyone writes in their time out on the sign-in sheet and collect Evaluation Forms; in order to receive CEUs, the chapter must receive completed Evaluation Forms.
5. For CEU events: notify attendees to allow 45 days for processing CEU certificates; certificates will be sent out via USPS or email.

Collect the following materials after the event:

- Sign-in sheet with written in attendee names and times in/out
- Chapter Evaluation Forms or ISBE Evaluation Forms (if applicable)
- On-Site Registration Forms (if applicable)
- Any payment (if applicable) – **DO NOT SEND CASH BY MAIL!** Instead write a personal check for the cash acquired from attendees and keep the cash.

For non-CEU events: District chairs do not need to send sign-in sheets to the NASW-OK Chapter after the event.

## EVENT CHECKLIST

### *Organizing the Event*

- Select date, time, and venue for event
- Find qualified speaker to give presentation (if applicable)
- Negotiate speaker fees (if applicable)
- Determine how many CEUs will be offered for event (if applicable)
- Solicit marketing description from speaker for event; also speaker bio and other workshop materials (Power Point, etc.) (if applicable)
- Determine price of event based on CEUs offered and overall cost of event
- Determine whether venue/event requires an attendee minimum/maximum
- Send any speaker or venue contracts to be signed by executive director (if applicable)
- Submit Event Approval Form (EAF)
- Once approved, promote event via district e-mail blast and district update
- Receive pre-registered sign-in sheets via e-mail from chapter the day before the event
- Print out sign-in sheet, the Form - On-Site Registration BW, Form - Evaluation, and ISBE Evaluation Form (if applicable) for total number of registrants plus extras for any on-site registrations in advance of event

### *At the Event*

- Have all pre-registered attendees sign in on sign-in sheet with their name and time
- Have all on-site registering attendees do the following:
  - Sign in on sign-in sheet
  - Complete a Form - On-Site Registration BW in full
  - Provide payment

**Emphasize all forms should be written LEGIBLY to ensure receiving CEUs**

- Every attendee must be given an evaluation form
- Collect evaluation form from all attendees and have everyone mark sign-in sheet with time out after completion of event

### *After the Event*

For CEU events, within fifteen (15) days of the event, scan and e-mail or mail (make a photocopy of papers first) the following to NASW-OK:

- Sign-in sheets
- Attendee evaluation forms
- Any on-site registration forms
- Any funds acquired during event (Checks only—DO NOT SEND CASH)

For non-CEU events, there is no need to send anything back to the chapter.